Using

SPEEDY ORGANIZER

The Digital File Cabinet for Windows
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About

The Problem – Windows File Folder is not the answer

One of our clients - Lynette Kautz, Business Manager at Stratford School district explains it best.

“The process of creating PDF’s started some while ago and it became obvious that as several hundred documents had been loaded that it was becoming difficult to locate specific invoices or purchase orders in a timely manner using just the Windows file folder structure. Storing the actual PDF documents in a windows file folder structure alone cannot provide the necessary indexes and keys to easily retrieve a single document from within many.”

In laymen terms, this means that as you store more and more digital documents into a Windows file folder(s) structure, the ability to retrieve the correct document efficiently and effectively becomes slower and it takes the person looking for specific documents longer to find, if at all.

The Solution – Speedy Organizer “The Digital File Cabinet for Windows”

Speedy Organizer has a search engine designed for digital document retrieval which automatically enforces your own business filing procedures so that documents are put in the same place and in the same manner without exception, regardless of who is filing them. This ensures that when you need to find a document only as few matches as possible is provided which always includes the specific document requested. A phrase that could best describe this approach might be a “Reverse Google”. This significantly reduces the amount of elapsed time a user would need to find the requested document. It is much more efficient to find a specific document when presented with 5 choices than it is 50 or even 500.
About

Paperless

Paperless, the term, is thrown around so much it truly has no meaning at all. Paperless is something which is achieved with many technologies not one. Speedy Organizer is not THE paperless solution. Instead it can be part of paperless solution your organization or you personally pursue. Speedy Organizer is used with computers, servers, network drives, online drives, scanners, digital copiers, digital files, faxes and PDF software to name a few.

Magical Filing

There is no magical system available to file things properly without the interaction of a person. With that said let’s talk about a REAL solution. One that is customizable and does what is says and makes that process as simple and painless as possible. With Speedy Organizer each document which is filed is added to a document Library for fast and immediate retrieval by keywords today, tomorrow or ten years from now.

Scanner, Multi-functions and all different types of files

Scanners and multi-functions create digital documents and Speedy Organizer works with any and all of them. Speedy Organizer additionally stores any type of file and keeps that file in its native format in a non-proprietary format.

A File Cabinet- a very fancy one!

When you call your bank looking for information about your account, the representative does not put you on hold and start clicking around in Microsoft File folders trying to find your information. They instead “pull” information about your account by simple keywords (such as by name or social security). These “search” results are provided as a document report, almost looks like a spreadsheet. The point is that it is not very visual but very efficient. Initially you may feel that Speedy Organizer is a very different system that what you may be used to. You may want the look and feel of Windows File Folder, but Windows file folder or a system like it are not a solution for digital document management. Within Speedy Organizer the filing process may be a little boring and clerical but is well worth the effort. When done on a regular basis every important document you have and need, will be available at your fingertips. When you need a document you will just type what you are looking for find it, view it and use it, then on to your next task.
About

Sometimes doing what is needed is not fun but necessary?

Filing is clerical and boring by nature but necessary. Speedy Organizer has been designed to make this process as automated and painless as possible, but we are sorry we are not some really exciting software. Speedy Organizer instead is dependable, efficient, secure and scalable.

Created by users, Speedy Organizer offers the simplest digital document management and filing system available today. To get you started quickly the following guide will provide all the information you need to start to store documents digitally with the Speedy Organizer.

Speedy Organizer is a digital filing system plus so much more. Speedy Organizer enables any user or business to index, catalog and archive as many documents and or digital files as you would ever want. Once archived the documents for ever sit in a central location (repository) so they can be called for at anytime by simple keywords, advanced searching or full text searching (text inside the documents).

Speedy Organizer is a digital file cabinet system, it is a all digital file system, it is a records management system, it is a full fledged document management solution, it is a document archive and retrieval solution, it is a document sharing and collaboration system for an entire organization, it is a client records system, it is a document workflow system.

Thank you for being a Speedy Solutions client and for joining the Speedy Organizer community. For additional information on the Speedy Organizer product visit http://www.speedyorganizer.com and click on the support tab.
Filing

Speedy Organizer is very similar to its historical predecessor the old metal file cabinet. In the old days when a metal file cabinet was used it was brought to the office empty. It required the user to decide how things would be filed into it. Generally a meeting would first take place and everyone would agree on some pre-determined filing structures and procedures. **Speedy Organizer works the same way, you have to decide the "file structure" as described below.**

**File Cabinet Structure**

1. What is the name you are going to refer to this set of documents, what are you going to call this file cabinet?

2. What types of documents are you going to store in it?

3. What type of filing system should it have for this certain set of documents?

4. How do you want to search for and locate documents in this file cabinet?

Obviously each office is different on how they want to file documents. One company's filing system, even though they could be in the exact business as another, will differ because a filing system is specific to that organization, their documents and their people.

**Speedy Organizer** in this way is similar to an old file cabinet. You, the user, decide how documents are filed away, you decide how the filing system is created and maintained.
Filing

Some quick ways and light points on how Speedy Organizer differs from the old filing cabinet.

✓ Speedy Organizer can store as many documents as you would ever want and does not require any space within your office.

✓ With Speedy Organizer once you select the filing system everyone in your office must adhere to organizations created filing system. It creates a level of standardization that is impossible with either paper filing system or a windows file folder system.

✓ No more lost documents and you view documents right at your computer. No more file cabinet searching or getting up to view a document.

✓ Customer requests for documents are instantly satisfied via email, even while they are still on the phone. It allows for a level of customer service which is in line with customer expectations for today.

✓ You can search and locate documents by the text inside, absolutely not possible with paper based system.

✓ Speedy Organizer saves money and makes the staff more efficient reducing printing costs and in the event of a requirement to produce documents related to a legal matter (well enough said!).

✓ If you have already invested in a scanner, multi function or copier it is most likely being underutilized. Speedy Organizer will enable you to unlock the true power of these types of office equipment.
Speedy Organizer – First Time Use

Once installed click the Speedy Organizer Icon to start

This screen will appear this is access to help resources. **CLICK CONTINUE**

It will ask you to register click yes and follow instructions – see registration at the end of this guide if you have further questions.

Next you will be presented with a sample File Cabinet. This file cabinet will not require a Login others may. If they do the default is admin – admin for user name and password FYI!

The main gadget will appear, you are ready to learn the Speedy Organizer
Quick Note - Main Speedy Organizer Gadget

You can perform every popular function right from this gadget, such as:

**Add documents** using Document Filing, Import from Scanner or Add Multiple Documents. **Tools and Settings** where all of your settings and options are available including: Admin Settings - Manage User and Security, Open Repository, Delete Document, Registration, Logger Information. File Cabinet - Modify File Cabinet, Create File Cabinet, Delete File Cabinet, Backup File Cabinet, Restore File Cabinet, Export File Cabinet, Import Data, File Cabinet Setting Scanner-Copier-Fax Set and Help Resources. **Help**, direct access to online help and resources. **Records** – create master records which documents can be attached to. Can also be used for creating digital notes and retain contact information about a record. **Search** - enter what you are looking for right in the Speedy Organizer gadget. **Advanced Search** - search one keyword against another keyword. I want to see all my credit card statements for 2011. **Full Text Search** – search for the text, or combinations of text inside the documents. **Date Search** – search for documents by the date they had be filed. **Folder Search** – replicates a folder structure for scrolling around looking at documents.

Please read further for a detailed description of each of these functions.
Speedy Organizer “The Digital File Cabinet for Windows”

This is the Speedy Organizer “The Digital File Cabinet for Windows”. One simple gadget for managing documents of any type.

Right from here you can add documents and search documents in your file cabinets.
Quick Note - Moving the Speedy Organizer around

**TIP** You can move the Speedy Organizer program around by bringing the mouse on this left hand corner and dragging it. This will work with all screens of the Speedy Organizer. To close the program just click the red X.

Quick Note – Drag and Drop Documents directly into app.

**TIP** drag a document directly into the gadget at this location and then file it.
Quick Note – Great ways to search in Speedy Organizer

**TIP** supported searches keyword, advanced, full text, date and file folder all from here.

Quick Note – Create as many file cabinets you need!

**TIP** create as many File Cabinets as you need with security and different filing procedures.
Quick Note – Works directly with Google Drive and SkyDrive

TIP have the best of both worlds documents on your local computer and also in the cloud. Speedy Organizer seamlessly integrates with Google Drive and Microsoft Skydrive
LET’S GET STARTED FILING!

The basic process with Speedy Organizer and all of the different types of documents which can be stored is always the same. Speedy Organizer is a filing system which is controlled by the user. When a document is filed away, the document is filed in a standardized way via a form as shown below. The standardization of the filing is what makes Speedy Organizer so great. Documents which are filed properly and in a standardized way are very easy to find when you need them!

Steps on how to file a document with Speedy Organizer

1. Click the Document Filing Icon as shown above. Next browse to a document or file that you would like to Add it is selected from somewhere on the computer. Once you select the document or file double click on it

2. Next you will be presented with a filing form asking you to tell us more about the document. This form is customizable and can be changed at anytime. A filing form is shown below. You next - select what "keywords" you want to associate with that document. For example if you are uploading an American Express Statement you may select "keywords" as shown below. Later you will locate the document by the same "keywords" you associated with it when you put it into the Speedy Organizer.
3. You then "File" the document.

Filing form shown below – this is how you file a document.

4. Once filed the document is automatically **grouped and linked** with other documents. All credit card statements are now together, all American express statements are all together, all 2011 documents are together and all documents related to 2011 taxes are together.

5. It is now cataloged and can be called for at anytime **by keywords** using "search". For example the above document could be located by American Express or 2011 or Credit Card Statement or 2011 Taxes etc..... Plus with the **Speedy Organizer advanced search** you could then search for ALL your statements for all of your credit cards for March, or ALL of your American Express Statements over a one year period or over all time.
How to get documents into Speedy Organizer

**Document Filing** is the most common way to get documents into Speedy Organizer. In other sections you are going to see many different ways to get documents into Speedy Organizer but they only relate to specific uses which may or may not be relevant to your needs. So concentrate on the **Document Filing** section below, as this is by far the most commonly used, these details will explain how easy and fast you can get documents into the Speedy Organizer.

The overriding benefit of **document filing** is the way filing gets standardized. Standardized filing makes finding these documents at a later date simple and easy which is the whole point. If you are going to store important documents digitally you better be able to recall them immediately.

### Document Filing

**TIP:** **Document Filing** and the screen which appears can be modified and changed using **Modify File Cabinet.** **Modify File Cabinet** can change the way documents are filed. You can access **Modify File Cabinet** by going to Tools > Modify File Cabinet.

**TIP:** During **Document Filing** when you browse out onto your hard drive and then select a document for upload. Please note that each time a document is file with the Speedy Organizer it will be erased from the current location. It is then just moved to another folder on your hard drive, network drive, online drive or server which you decide. (See creating file cabinet and repository path)

**TIP:** What is a “To Be Filed” folder? It is a folder where documents can be stored temporarily waiting to be filed by the Speedy Organizer. One "To Be Filed" folder is created at time of software installation. If you would like to create your own “To Be Filed” folder simply anywhere on any screen, RIGHT CLICK and the select New and Folder – name the folder “To Be Filed”. The “To Be Filed Folder” does not have to be on the local computer it could be anywhere and as many as you would need. For example "To Be Filed Accounts Payable" , "To Be Filed Client Files", "To Be Filed Human Resource Records", "To Be Filed Sales and Marketing Docs".
Document Filing continued

Document Filing is the most common way to get documents into the Speedy Organizer. Please see step by step instructions below on how to use Document Filing.

......once you click on Document Filing you will browse out onto the computer as shown above. Here we show browsing to the "To Be Filed" folder. You can browse to any folder or any file on your computer for that matter, once filed by Speedy Organizer it will get erased from the current location, renamed and filed in a folder (in a location you selected). Once you select a document you will be presented with a form asking you to “Tell us more about this document”. The Speedy Organizer will prompt you on how to “file” this document.
Document Filing continued

So for example there are 65 documents in your "To Be Filed" folder. Each time you use Document Filing one document will erased each time filing is done. So the folder would start with 65 and then have 64,63,62 etc...4,3,2,1 - Your done!!

Once you have browsed and selected a file for filing a screen will be presented so that you can attach keywords to this document. Each business, company or process will have different keywords and the way you file documents and files is completely customizable in the Speedy Organizer (See Modify File Cabinet and Create File Cabinet and File Cabinet Templates). You can start from a particular template and then modify the template to make it just the way you want it. You can even create a "blank file" cabinet and then customize it right from scratch. In this way Speedy Organizer is similar to a metal file cabinet. It can hold papers right after you purchase it, but it has no structure. It requires you to set up the structure of how things will be filed, before you start to use it.
Document Filing continued

Document Filing works the same way. You can create the structure to the document filing so that it is specifically the way that you want it. You do that by Modify File Cabinet in Tools; modify file cabinet changes the Document Filing screen shown to the left above.

Next add the "keywords" to this document.

Words added for example such as vendor - Baylor, invoice # 33456, Date 4/16/2012 detail of what type of document it is Invoice.... any and all of these words will become searchable and linked with that one specific document. Also during Document Filing Speedy Organizer automatically renames the file as part of the process. The above named file would be Baylor_33456_04-16-2012-Invoice.PDF. Through a process each of those keywords goes into our proprietary search engine, also behind the scenes keywords are being grouped and linked together. Documents that have the same keywords are grouped together, means Baylor Supply Corp, will go with all the other Baylor Supply Corp documents. Credit will go with all other credits. So this enables you to view a single document or groups of documents all presented within seconds. So when you go to look for a document as few choices as is possible will be presented to you. Immediate access to your documents is provided through simple keyword searching.
Document Filing continued

**TIP - TOP MOST in Tools > File Cabinet Settings** - Are your documents or other programs coming on top of the Speedy Organizer so you cannot see the program. You can set the Speedy Organizer program always to be on top. This is something which is turned on or turned off. You can turn it on by going to **Tools > File Cabinet Settings** and the selecting Top Most. This will make Speedy Organizer always be on top. To turn it off just go to **Tools > File Cabinet Settings** “and then to "Top Most" and uncheck it. When you are done enter your **Keyword** information click "file now" at the bottom right hand side of your screen and you will receive a message "Filing Done". This means that the document has been added successfully to the Speedy Organizer and is immediately available for searching NOW or ten years from now. (see screen shot below).

![Speedy Organizer Document Filing screenshot](image)

**TIP Auto Fill for Add Single Document and Add Multiple Documents**

To reduce down on keystrokes and to remember important data this feature auto fill will be used on Document Filing and Multiple Document Filing screens. If for example you have entered in a name of a client, patient, vendor etc... Auto fill will automatically recall this information as you begin to type in the name. This cuts down on errors during data entry and keystrokes and time related to Adding Documents.

![Auto Fill screenshot](image)
Document Filing continued

TIP: "Attach View" and or Document Filing with "Attached View" - this will work very well if you are uploading scanned PDF documents or if you are working through a large folder of scanned documents and want to use "auto load". (screen shot below of attached view and auto load). To turn on attached view first you will need the latest version of Adobe reader installed then go to Tools > File Cabinet Settings and select Attached View.
Document Filing continued

To turn on or turn off attached view in Tools > File Cabinet Settings. For attached view to work you will require to have installed the latest Adobe Reader. Use attached view if you are only filing away scanned PDF documents. If you are filing away all sorts of files and documents, do not use attached view instead use the regular method of Document Filing without attached view.
TIP - Auto Load is an option you can select right within the Document Filing screen. It can be turned on or turned off by checking the box. Document Filing with Auto Load is very good if you have many documents to file away. For example if you have been scanning and saving documents for the week but have not had any time to file them away you may have 80 unfiled document in your "To Be Filed" folder. Auto Load will enable you to select this entire folder of documents and after each document is filed away the next document will present itself “opened” to be filed. You will not have to browse to each document. When all of your filing is complete Auto Load will stop and you will understand that all of your filing is done. To Start "Auto Load" after you have selected Document Filing and your keyword screen is available you can select a check box for "Auto Load". What that will do is enable you to add an entire folder full of documents and it will just load one to the next to the next to the next until you have file away all of your documents automatically. (see screen below).

The above screen is showing you how to turn on Auto Load so documents are presented one after another for immediate filing.
Document Filing continued

**TIP – Skipping a Document** with auto load is an option you can select right within the Document Filing

Skipping a document provides you four choices.

1. Move it into another File Cabinet
2. Keep the document in the current location but just skip over it.
3. Delete the document
4. Remove the document and bring it to the desktop
I have documents filed now how can I retrieve them?

Search Overview

Searching in Speedy Organizer is all done through an extremely efficient search engine which is database driven. This database organizes links and store all of this important data associated with the documents. When you need a document just come into the Speedy Organizer and type for what you are looking for. You can do searches 5 ways but what is great all of the searches are only being done within that file cabinet only. **Keyword search** is searching on the different words that were associated with the document during document filing. **Advanced Searching** allows you to do grouped or linked searches answering normal business questions. “Let me see all the contracts for last month” – “Let me see all of the vendor invoices for our Vendor American Supply over the past year”. **Full Text** even gets more in depth and deeper into your documents data. How long would it take you to find a specific part # on a vendor in your regular file cabinets which is 4 years old – days? Weeks? Full Text search can locate specific numbers or parts thereof within seconds and more... **Date search** enables you to go back over what was filed and when during a specific date range period. **File Folder search** enables you to scroll around and look at documents in folders.
Keyword Search

How can you use Search? - The fastest way to search for a document is to just enter a keyword right into the gadget as shown below.

Your search result will be displayed as shown below in what we call a "grid view" click the arrows to get to the "expanded grid view". What is grid view? All of your documents displayed with all of the information it was filed with. This way you can immediately find what you are looking for. The grid also works similar to an excel sheet, so you can click on the headings to arrange that way or alphabetizer of arrange in date order etc... Many, many, many different ways to look at your documents.
Keyword Search continued
What is nice about the grid view is that you can now "sort" documents by the keywords by click on the top as shown below here

You can even expand the grid by clicking on the <<< and this will provide this type of view.
Keyword Search continued

You have probably searched for a document because someone needs it. Speedy Organizer gives you many ways to use the document once it has been located, you can email the document, you can copy and paste it somewhere else, you can start using it in a workflow, you decide.

**TIP - Email Documents** – After a search result has been displayed you can email selected document by simply selecting the documents from a check box and then to email just select the email Icon as show below. Important Note – You need a local version of Outlook installed for this feature to work.

**TIP – Copy and Paste** – selects documents you want to copy from the check box and then click Copy icon as shown below. You will then have a copy of those selected documents in memory to paste where you would like.

**TIP – Excel Reporting** - You can also push out a report of documents by clicking on the excel button as shown above. This will provide a full list of documents and all keywords associated with them. Very good for audits and required reporting related to your documents.

All the below features shown will be explained more in detail in later sections
Advanced Search

**Advanced Searching** is very useful to filter your search results. **Advanced Searching** also supports relational searching, meaning you can combine keywords. For example you may want see all documents related to your client American Company and with advanced search you could view only contracts related to American Company.

What is so great about utilizing a back end database for the keywords is that once the keywords have been associated with the document there are so many ways to find and use that document, because of all the behind the scenes grouping and linking which is done within the

For example if you have digitized and stored all of your companies human resource records in the Speedy Organizer. You could search for documents this type of way.

1. Let me see all of the employment applications for 2010
2. Let me see all of the employment applications for 2011
3. Let me see all of the employment applications for salespeople
4. Let me see all of the employment applications for salespeople for 2009

All of the above searches would be completed in seconds by using the **advanced search in Speedy Organizer**. Here is a screen shot showing **advanced searching** in an accounts payable file cabinet.

Below is what will appear when you click advanced search it is just a replication of the same way that you originally uploaded the document. You can now "filter" the document through this search
Advanced search continued

Above is shown relational searching which you can only do in a database. You can filter your searches jumping around your documents within seconds. Each time providing you the exact documents needed.
**Full Text Search**

*Full Text Search* - Allows you to search the text inside the documents. To begin you can search on a single word such as a company name or a specific invoice number, an example for this type of search would be a specific invoice or item number such as 99838291. The full text search also supports AND/OR searching which allows you to search combination of words. An example would be to refine your search with And Or searching so 99838291 AND American. This would yield only documents that have both 99838291 and American in the text.

**TIP** - for Full Text, Documents must be readable for the Speedy Organizer to search the text within them. Please make sure that your scanner is set to create an OCR PDF document. If the document is not readable Speedy Organizer cannot search the text within.

**TIP - FOR FIRST TIME USE OF FULL TEXT** - you must click index for the first time use. After that if you are having any problems searching you can click re-index. Once index has been started it will automatically look for documents each time they are added to the Speedy Organizer. Also look at the help for really advanced full text search queries.
Date Search

**Date Search** - Allows you to look at a certain period when documents had been originally uploaded. An example of this type of search would be looking at all documents uploaded from 03/10/2009 to 03/10/2011.
Folder Search

Folder Search – Look at documents by clicking on “Folders”. This is a way you can scroll around looking at documents differently.
I have retrieved documents, now what can I do with them?

Once you do any of the searches within Speedy Organizer you can then do more things with the documents once the search is complete. Below is an overview of what is supported.

Once a document has been searched for you can then do many things with those documents such as open it for viewing, email it, copy and paste it, kick out a report on that document search, change how it was originally filed, create a new version of the document and retrieve a lost password if it was originally password controlled during the initial filing.
Emailing a document directly from the application

You can email any document directly from Speedy Organizer you will just need the following to use the email process easily. You will need a local version of outlook running as the email function is tied to an outlook process. If you do not have or use outlook you can still attach documents to an email just use the "copy and paste" function instead. Copy then open up your email and Paste.
Check Out

Once a user has opened a document that document will be locked out to all other users until it is closed. This will insure that multiple version of the same document does not exist.

Check out will only work with Grid View. In Folder view you will not be notified that another user has the document out and it may or may not open depending on your organizations file folder settings.
Version Control

Document versions may be required at your organization. If a document is going to be modified or altered a new version of this document is required to exist. The process to use Versioning in Speedy Organizer is a simple process. Search for and locate the existing document that you want to create a new version of (view that document in a GRID). On that document as it is displayed in the search results right click on the document and click Version. A new version of the document will be immediately created (also tracked by date) you can now open that document and modify and save it as you require.

Right Click in results grid on the document you want to version as shown below
Document Reporting

As shown below you can do a search on a specific set of documents and then push this out to an excel document as a report. This contains all the information about the documents and the keywords and fields associated with those documents.
Copy and Pasting Selected Documents

select one or multiple documents to be copied

when complete selecting click here and a copy will be made
Fix something that was filed with wrong information

Once you select it the document will re-open in the Add Document Upload screen you can now change the information when done press save.
Secure Documents

Searching for and Opening a Secure or Password Protected document or file. When you search for a password protected document or file it will be displayed as normal in your search grid. The only difference is a document that is protected will be highlighted in a little bit of red as shown below. When you select to open this document you will be asked for a password. If you cannot remember the password you can request the password from the System Administrator as shown in second image.

Secure or Password that was forgotten has to be requested first from the System Administrator. The password will be returned to you when the system administrator has acted upon your request. It is not an automatic process. If they do not respond then you will not get back the missing password. Once they do respond you will be able to access the missing password and open the document by clicking on the "Lock Icon" first. The following screen will display and you will be able to view password and open document.
I get it! I can put documents in and search them I now want to create my own cabinet

How to Setup your File Cabinet

This is a non technical explanation of how to get started with you Speedy Organizer. It will touch on what technical sections relate to this but more importantly it will get you in the proper mindset to use a digital document filing cabinet and management system.

How to use the sample File Cabinet

Before you create your first file cabinet, first open up the sample file cabinet in the Speedy Organizer.

Do these functions in the sample file cabinet to understand and get comfortable with the system.

1. Add Single Document - add a few documents into the Speedy Organizer attaching keywords of your choice. (Add about 30 documents if you have time)

2. Search - use search to view documents that you have just uploaded by Add Single Document. If you added a document with the name "American Express". Search on american and then open that document.

3. Next use Search again but this time do not put any search term in the search field. This will result in you seeing all the documents but you should also see the option to view the documents in a folder or view the document in a grid. (you would have had to upload over 10 documents for this message to come).

3. Advanced Search - use advance search for documents in Speedy Organizer. Search on a keyword like Year - 2011 and then search on Year - 2011 but filter it for another keyword such as Credit Card Statement or something like that.

Setting up your filing structure

4. Go to Modify File Cabinet and change and delete things in here. Keep going back and forth between Modify File Cabinet and Add Single Documents screen. Changes to Modify File Cabinet specifically change the Add Single Document screen (or they way documents are filed away)
1. Edit a field name
2. Create a new field
3. Change a field type to another field type
4. Create a Field for a Drop Down List
   a. add a drop down list
   b. delete and add items to the drop down list
   c. re-order the drop down list by alphabetical order or some other order.
   d. add a drop down list by importing a .csv
   e. add a drop down list by copy and pasting a text file list.
5. Create an email Field and then go back to Add Single Document and send an email out to someone after document has been upload.

Play around in this section as much as possible because this will give you the knowledge on how to customize your file cabinet when you get ready to create it.

**How to create your First File Cabinet**

Now that you have a basic knowledge about how you can customize your File Cabinet it is time to stop for a moment and really think about what documents you want to store in the Speedy Organizer and how you will need to be able to search for them.

This is a good time to get your thoughts down onto paper or an excel spreadsheet. Also bounce your ideas around the office to the rest of the staff so they are in agreement with the "file structure" that you are proposing. Think of the traditional file cabinet again. The office supply house has just shipped one to your office. Before things can start to be put into that file cabinet someone or better a group of people have decided on how things will be filed away. Speedy Organizer is not different. You must decide how you want to store the documents and most importantly how you want to search for those documents.

This would be a mock meeting you may have with your staff to try to pull out from them the best way to store a certain type of documents.

Karen the Office Manager is running the meeting “Ok let’s get started with the meeting on how we are going to start storing our Accounts Payable digitally". In the meeting is the Office
Manager - Karen, the Marketing Manager - Kevin, Comptroller - Dawn, IT Manager - Sarah and Bill, Carol and John Office Staff.

Karen “We have to decide how we are going to store the sales related documents, I need to know from everyone how you would like to search for these documents if they are stored digitally"

Bill - “by customer name" - everyone agrees.

Dawn - "by customer number" - everyone agrees.

Kevin - "by purchase order number" - everyone agrees

Sarah - "by year"

Dawn "by invoice number"

Kevin " by what type of record it is - is it an invoice, credit, sale order, acknowledgement, delivery receipt?"

So what would come of a meeting such as the above? In the Speedy Organizer you would create a File Cabinet using the Create File Cabinet Wizard. Upon completion of the wizard you would then use Modify File Cabinet to create the customization that was spoke of.

Shown below here is the Add Single Document screen - exactly related to what was discussed in the meeting. This file system is completely agreed upon by all the staff so they will use it and it will standardize and archive every document that goes into it. If one staff leaves and new person starts at the company they can learn this filing system in less than 10 minutes.
Let's see how we did that, means how we went from a meeting to the actual File Cabinet with the structure the organization wanted

1. First at the start screen we selected Create a new File Cabinet

2. The Create File Cabinet Wizard opened and we used it to create an accounting file cabinet template.

3. Once the File Cabinet was created we went to Modify File Cabinet and changed the Fields to match the field we agreed upon at the meeting.

4. Each time I added a field I would check the Add Single Document screen to make sure it was in the way that I wanted. Now I am done and our new digital filing system is a success!
OK let's create a real file cabinet these are the steps

Open File Cabinet – Create File Cabinet

When you first start the software you will be presented with some choices.

**Open File Cabinet** - You can open a samples bills file cabinet to get a basic understanding of the Speedy Organizer software. This is an example of how you may use the Speedy Organizer to organize your bills and statements. You will first have to get some sample "bills and statement" to upload so please either scan some documents in or download them from their prospective website.

If you select **Open File Cabinet** and Sample Bills and Statements the Speedy Organizer Main Gadget will appear. Read below on how to use the Speedy Organizer Gadget (SEE SECTION FOR MAIN GADGET)

Next selection will explain how to use **Create File Cabinet**. We recommend you work in the sample bills file cabinet before creating your first file cabinet.

**Create File Cabinet** will take you into the File Cabinet Set up Wizard
Create File Cabinet continued

With the **File Cabinet Set up Wizard** you will be able to create different file cabinets for different types of documents you are storing. Just like a traditional filing system you could have a separate file cabinet for

- Accounting Files
- Accounts Payable
- Client Files
- Legal Files
- Human Resource Records

You create the **File Cabinets** and can even select from the **Speedy Organizer Templates** (over 75 different types) for some **possible suggestions on filing structure or how the file cabinet should be set up**. These covers all different types of small businesses (Insurance Agencies, Medical Offices, Tax Firms etc....) also individual processes within small businesses (Accounts Payable, Human Resource Records etc.........). Once you **create a file cabinet** from a **template** do not worry you can modify it later to your specific requirements (**See Modify File Cabinet**). See also **Create File Cabinet Wizard**
Create File Cabinet continued

You can create a file cabinet two ways one from the Create File Cabinet Wizard at the main start and the other from the Tools menu. We will discuss both here starting with the Wizard.

Next enter the File Cabinet Name no space or characters, then common name.

Here is an example of the naming that is supported first field no spaces no characters the next field you can have spaces and more common user friendly name. Try to refer to what is being stored in this file cabinet. The more it relates to the documents the easier it will be for users to remember.
Create File Cabinet continued

Next select a template on the type of file cabinet you would like, not sure what you need then select blank and create it yourself. You should have everything on paper at this point as to what documents are being stored and how you would like to store them. You can view the template by clicking on view. Remember the template does not have to be perfect you can create the file cabinet and then go in and customize it using Modify File Cabinet.

When done click next and this next screen will appear. The next screen will ask you what location you want to store the documents. This location can be anywhere on the computer, the network, a server or a network storage device, even in the cloud you decide.
Create File Cabinet continued

Select where you want the documents stored related to this specific file cabinet. You can select different locations for each file cabinet.

**IMPORTANT NOTE**: The document repository or where you will be storing the documents is not backed up in Speedy Organizer. You should select a location to store the documents which are regularly and redundantly backed up at regular intervals.

Lastly you will receive a summary page of the choices which you made. You can go backwards to change anything that you want at this time. If everything is correct you can just select finish.
I created my file cabinet now I want to change it and customize it!

Modify File Cabinet > Part of Tools > File Cabinet

This is a very important section to understand as it provides the most control over your file cabinet structure.

As described earlier Speedy Organizer is just like a traditional filing system in that the user must be involved to create their unique system. Obviously if you create the file cabinet structure it will be more user friendly and more understandable to your company. For example if you have create a file cabinet from a template and in that template the term "accepted proposal" is used to describe a certain record type it may be very confusing for your office staff to use it if your company regularly uses the term "contract". In Modify File Cabinet you can change the term "accepted proposal" to "contract" and so much more.

IMPORTANT NOTE: When we are working in modify file cabinet we are really just changing the way keywords are attached when documents are uploaded. Modify file cabinet specifically changes the Add Single Document upload screen as shown below.

When you use the Modify File Cabinet it specifically changes the way documents will be uploaded and subsequently filed away.
Modify File Cabinet

In modify file cabinet we can delete all the fields and start from scratch. We can keep one field and then create a bunch of new fields. It is up to you the user to decide what is required. Before you start on creating and modifying file cabinets it would be a good idea to meet with staff first. It is best to get the structure down on paper before at least for a good outline on how you want to search for documents in a given file cabinet (See also Section Creating your 1st File Cabinet). A good starting point is to think about how you want to search for the documents. Think about that first and that will give you a good approach on how you want to file the documents away. For example if you want to search these documents by Client Name - well Client Name then would be a field (either text box or drop down). You may also want to search these same documents by record type such as is it a contract, proposal, general correspondence, etc...? so record type would be another field (drop down list). You may also like to segment it by a year - that too year would be another field (text box or drop down list). We have worked with thousands of small businesses over the years and we highly recommend that you try to keep to five to seven fields into total for each cabinet, unless for some reason you absolutely need more. The reason behind this is that someone actually has to file these documents away and do you want someone attaching 14 keywords to a single document? What value would that bring to the organization? If it cannot be justified by either a cost or an efficiency standpoint do not put so many fields.
Lets discuss what types of field choices you have available in Modify File Cabinet.

1. **Text box** (most common) - plain text box enter whatever you want including amounts

2. **Drop Down List** - static list of items to choose from can be changed by admin at anytime

3. **Date Time** - standard Microsoft date box

4. **Multi Line Text box** - large text ability to write a long note

5. **Months** - abbreviated months such as Mar, Apr etc...

6. **Email** - ability to upload a document and route it immediately via email require local outlook program

7. **Document Destruction Date** - set a date for destruction in the future for this document

8. **Email Dropdown** - select an email from a dropdown list requires a local copy of outlook to work.

9. **Folder** - creates a folder such as client name etc. (you decide the name of the folder)

10. **Records** – creates a field which corresponds and is populated by the Records.

**SEE FULL DESCRIPTIONS BELOW AND HOW TO USE EACH**

**Modify File Cabinet**

**Text box** (most common) - plain text box enter whatever you want including amounts

Text box is a simple plain text box which allows for up to 36 characters of text or numbers. With Text Box once a value has been entered into it just once (say a customer name American), it will automatically save it. Then the next time you have to enter the customer American it will just AutoFill that name (so you do not have to type it every time!). You will also have to consider this when deciding whether to use a text box or a drop down list. Being that text box stores all entered information you should only use the Drop Down List for defined lists that will not change that regularly such as a record type (contract, proposal, purchase order etc...).
Drop Down List - static list of items to choose from can be changed by admin at anytime

This is a very good Field to use for a static group of items such as a list of record types, or a list of sales people, or list of satellite offices. The list should be somewhat static as it can be changed but is not something you would want to be changing every day. What is great about it is that it forces standardization on the users to all call a set a documents the same thing. If everything is cataloged the same it will be very easy to locate these documents when they are needed.

Once a drop down list is created for the first time or needs to be modified at a later date you will have to select "Change" next to that particular Field. Change will only show up if you have created a Drop Down List Field. "Change" is the way you first populate a drop down list and or modify an old drop down list.

First you would login to the File Cabinet you want to Modify > the select Tools > then select Modify File Cabinet > if you are creating a new Drop Down List go to the bottom of the screen and select New+ as shown below.
As soon as you create a new Drop Down List it will not have anything in it, it will be just blank. You can add items to the drop down list by first clicking on Change - next to the Field and the following screen will open.
Now to either modify or to add in a new drop down list here are your choices on how to accomplish this.

You have three ways to get a drop down list in:

1. Copy and paste from a text file
2. Type in each list item in Criteria and then press update
3. Upload a single column list from Excel .csv
Here is an example of an Excel sheet that would be uploaded - please note it has to be only one column of information and does not require a header. It cannot be an regular Excel format, if you are creating it in Excel make sure you go to your file save as options and save the file as .csv - micro

This is how the .csv list should look like for import. First close this Excel .csv file> Next go to the File Cabinet you want to add this list > Go to Tools > Go to Modify File Cabinet > find the field you want to add this list to Go To > Change - at the bottom of the box which will open up you will see an option to add an a check next to a box that says Add Dropdown List from .csv - Go To > browse to find this file and select it. The list will appear above you can now modify the list, alphabetize it or delete items from the list - using Change.
This is how you can copy and paste from a text file - just go to a plain .txt file that has a one column list. Next copy that list that you want next go to the following screen and select "PASTE" the list will appear. Make sure that you have "updated" the list before closing.

IMPORTANT NOTE: You can change a field or a drop down list at anytime. For example if you have a field named Client Name which is a text box. You have the ability through EDIT to change that field name to Date and the field type to Date. The point is Modify File Cabinet allows you to change and modify things to your exact requirements. Many times Speedy Solutions clients
just mirror their old paper filing system. That can be accomplished by using Modify File Cabinet. You can customize any filing structure that you want using this feature.

Using Edit, Delete or Change - You do that by first selecting the Field Name and then select **Edit** or **Delete** or **Change** next to that field. This screen shot is shown below. Once the action has been selected the Field name will appear in the lower section of the screen. You can now make your revisions, make sure to click save when complete to save your changes.
Now for Vendor Name I could change the name of the field, I could change the Field Type or I could delete it. When complete with the editing click save.

**TIP: ADDING NEW FIELDS** - if for example you have five fields and now you want to add a 6th field that is simple to do you just select **NEW +** as shown above enter your field name and field type and press save. You would then have 7 fields; you can create as many **NEW** fields as you need.

Changing the order of the fields on your document filing screen. Use the Change Criteria Oder in Tools > Modify File Cabinet then select Change Criteria Order from bottom right hand corner.
Other ways to get documents into Speedy Organizer

Drag and Drop

Drag and Drop can be used on any type of file which has already been saved on your computer, from any location on computer or available network locations. First if you are in a document > Save it. Next go to that saved document and drag it on top of the Speedy Organizer Gadget as shown. You will then be prompted to select what file cabinet you want the document to go to.

Your done – total time about 3 seconds! Fast filing.
Drag the file onto the green highlighted area as shown below and a Screen will appear allowing you to file the document into a cabinet.

**Pending Filing**

Once a document has been dragged and dropped into a File Cabinet it is in a “pending state” means it is in the file cabinet but has yet to be completely filed away.

Once you log off the Speedy Organizer and come into the program again. You will be notified if there are any “pending” documents to be filed. If you have time file them away. Here is the message you will see with the pending filing screen shown below. Best if select Auto Load in the Document Filing screen as it will move the process along faster.
If you have time to file click yes and the next screen below will appear

Select the documents you would like to file.

The familiar Document Filing screen will appear file as normal and check Auto load to make the process go quicker.
Scanner – Copier - Fax – Folder

Speedy Organizer does not directly “scan” documents into the application. Speedy Organizer “imports” scanned documents from any scanner, digital copier, multi-function machine, fax (which faxes ultimately reside in a file folder) or watch folder. We will discuss about this more here.

Setting up your scanner, copier or multi-function to work with the Speedy Organizer. Any scanner, or copier or multi function can scan a document to a “file folder” somewhere on your computer or network. First find the location where the scanner, fax or copier currently scans the document to. You would find this location not in Speedy Organizer but instead just scan a document with your scanner and find out where the document goes to – what folder did the scanned document end up in? When you have determined where the documents are scanned to this is the location you want to set the Speedy Organizer Scanner Import to. First go to Tools > Scanner Import Others. The following screen will appear shown below.
Scanner copier fax continued

Next select browse to go to the same location (the folder) where you scanner-copier-fax end up in after they have been created by your scanner or copier, fax.

That’s it you are done.

Now scan as much as you want and when you are ready to import those documents follow the steps below. You must do the below process for scanned document to come into Speedy!
Scanner Copier Fax continued

Click the scanner import — as shown and all scanned document will automatically come in.

You will get a message telling you all have been imported properly.
Scanner Copier Fax continued

Next > you will be asked to you want to file now or later?

Click yes to start filing
Scanner copier fax continued

Start filing by selecting the first document- use auto load form there.
Folder Import

Access Folder Import by going to Tools > Folder Import

Before you begin to use Folder Import first create a new file cabinet using a "Blank Template" see how to create a file cabinet for more information about this process. Bring an entire folder structure into Speedy Organizer with Folder Import. If you have a complicated folder structure with Main Folders and Sub Folders upon Sub Folders and documents and files all along the way. This will be any easy way to tidy this all up and make it all searchable in the Speedy Organizer.

How will it work? For example you have a master folder structure called "Client Files" and within that main folder called Client Files you have subfolders for 4000 clients. In each of these client folders (the folder is named by the client) you have subfolders for Contracts, Proposals, Purchase Orders and Deliver Receipts. Even within these subfolders there are more subfolders etc...Speedy Organizer using Folder Import will extract all the documents and files from within that folder structure and move these documents into the digital file cabinet. For example one document may be tagged with these keywords > Client Files and American Company and Contracts and "the specific file name". Now you can immediately access the document by typing in any of the above mentioned keywords.

IMPORTANT NOTE - THIS PROCESS IS NOT REVERSIBLE. SO DO NOT USE THIS UNLESS YOU ARE FULLY AWARE OF HOW IT WORKS. OR MAKE A COPY OF A FOLDER STRUCTURE AND THEN IMPORT THE COPY KEEPING THE ORIGINAL STRUCTURE IN TACT.
Browse to the top level of the folder structure you want to import. For example you have a folder structure for “Client” and in that folder you have a 1000 subfolders and subfolders within those subfolders etc...IN THAT EXAMPLE YOU WANT TO BROWSE TO CLIENT FOLDERS and then import the entire structure.
For this example you would browse to American Company Marketing - when done click import and all of the folder structure and (files and documents) will be moved into the Speedy Organizer.
Folder import continued

IMPORTANT NOTE - After you complete folder import you can rename the fields using "Modify File Cabinet" - To begin with right after import the fields will have names such as Field 1, Field 2 etc...these names will not affect the searching.
Add Multiple Documents

Add Multiple Documents - This is a good way to get historical documents (documents or files that are already on your computers) into the Speedy Organizer (see also Folder Import). You can select up to 500 documents at one time and upload them into the Speedy Organizer in one process. To use the Add Multiple Documents you must be uploading documents or files from a FOLDER only, you cannot upload a file folder structure directly into Speedy (that means folders with subfolders). Add multiple documents must upload files or folder directly from a folder. If you want to upload folders see FOLDER IMPORT.

For example I have a file folder structure such as Clients and within that folder I have another folder A-M and N-Z and within that folder Client Folders such as American Company and within that folder a folder purchase orders. Within the purchase order folder there is 150 PDF documents of scanned purchase orders from the client. With the Add Multiple Documents I would browse to that folder location - purchase orders and scan the 150 documents and upload them. Once I have uploaded them they will be erased from the current location and moved as described above in Add Single Document.
Multiple documents continued

Please see screen shots below of Add Multiple Documents and the supported use.

Then select Add Multiple Documents - browse to the folder you want to upload and then select SCAN. You can then select which documents you want to upload you can view the documents by clicking OPEN.
TIME SAVER AUTO FILL AN ENTIRE COLUMN  First Select the Column for you want to enter Keywords into above we have selected Vendor Name. Next enter the keywords - above we have entered American - Next click SHIFT key on your keyboard and scroll down highlighting the column in "blue" -next just right click with your mouse and an option will appear called "copy column" now all the keywords will fill that column.

Auto Document Processing
Auto Document Processing - Data Import- this is a way to bring in large volumes of documents up to 5,000 at one time and it interacts with all high volume front end scanning software such as Kofax, Kodak Capture, Captiva, Digitech and others not listed. These types of software are used in high volume scanning environments. An example would be your are scanning a specific type of form where you need to be able to locate the form by three criteria or keywords such as Client Name, Date and Order Number. This type of software can extract the information from the documents automatically without doing any manual indexing. It can then be fed into our system for easy search and or full text searching on words that have not been extracted, up to 5,000 documents at one time. The data import can only be used with the multi user version of the Speedy Organizer.
An example how this works is shown below. To access the data importer you go to Tools> and then to Data Import from the left hand side of the menu.

**Auto Document Processing aka Data Import**

Part of Tools > File Cabinet

This is a way to bring in up to 5,000 documents at one time and to populate the information related to this documents right into the database. This would work with most major front end capture solutions such as Kofax, Kodak Capture, Captiva, Digitech etc... Please visit our Help Forum for more information about this utility. This utility is not available to Single user systems instead only to multi user systems.
Special Features Workflow

Workflow is something that has to be turned on you can turn on workflow by going to Tools > File Cabinet Settings > check the box to enable workflow. Once you do that an icon will appear on the main gadget for “workflow”.

Workflow lets you the user either set an alert for yourself related to a specific document or to send a document to another or multiple people in your organization requiring a certain action. Please note that workflow has to be enabled by the Administrator of the system. Once workflow is turned on by the Administrator a Workflow option will pop up each time a document is uploaded. To turn off workflow the user can just select the check box and this will either turn on or turn off workflow for this particular document. See screen shot below.
To view and open or archived workflow. Each user views their workflow items in the file cabinet it is related to. The user must be logged into a specific file cabinet to view their open items. Items for workflow do not cross over file cabinets. To view and open workflow you must be logged in that specific file cabinet. This is the support view for workflow, you get to this view at the main gadget by clicking what is shown below.

by clicking the above the following screen is shown
To open a workflow click "open workflow"

To respond to a workflow click "open workflow" make your response and press send as shown below.

You archive your messages by clicking archive this will move it out of a current action items such as Alert, Action Received or Action Sent it will move it immediately to archive. Once archived you cannot move the item back to a current action item.
Document Destruction Date

In Modify File Cabinet a option can be selected for Document Destruction Date, this will enable you to set a date for document destruction within the software. In addition to that information being stored in the Speedy Organizer Microsoft SQL Database it additionally will be embedded directly into the file extension name as shown below.

The document destruction date further extends Speedy Organizer smart file name technology in that it actually embeds a D in front of the Date, signifying DOCUMENT DESTRUCTION.
Document Routing

Business processes may require that a document be routed to an internal person at the organization or an outside person as part of some process. Speedy Organizer supports this by enabling document routing via email when a document is being added to the Speedy Organizer.

**Note: you must have a local version of outlook installed for this to work.**

In addition to bundling up the document into an email attachment the name of the email recipient is embedded both into the database and the file extension name.

A document can additionally be routed to anyone or any group via email. A history of this email will exist both in your email client and the Speedy Organizer Document Management Software.

Email can also be standardized as a drop down list. This would be a way to create a list of common emails so that keystrokes are reduced and the email address does not have to be added at each time of adding a Document.

See also set up Modify File Cabinet for more information on how to do this.
See also email documents
See also workflow
Secure Document - Password protecting during document upload

Documents can be secured by a password during Document Upload. This is something that has to be turned on by the Administrator in the File Cabinet settings. If the Secure Document is not turned on it will not show up during document upload and you will not be able to secure the document by password. If your administrator has enable Secure Document in File Cabinet Settings the users will be able to Add a Document and during this upload process they will be able to secure the Document with a Password. Once a password has been applied to a document the document that document or file will not be stored in the document repository but instead will be secured in the database files. The file will require a password to be opened. If a password is forgotten the password can be requested to the System Administrator. Only the system administrator can recover a password and send that forgotten password to the user who requested it.

Below you will be viewing screens for both Adding a Password and then Searching for a document with a password and how that document can be opened. Lastly we will show you how to request a forgotten password from the System Administrator.

First how to enable Secure Document in the Speedy Organizer or Password Protection you must be a Administrator to do this.
First you must be logged into the File Cabinet you want to add secure document to. Next you must be logged in as the administrator to enable this feature. To enable "Secure Document" or document password protection go to Tools > File Cabinet Settings and select the check box for Secure Document when complete click SAVE at bottom of the file cabinet settings page.

Now that "Secure document" is enabled the users will be able to apply a password to specific document they which to secure. This option will come during Add Document as shown below. To enable a password associated with a specific document select the check box, secure document during Document upload see below.

You can set a default password to be used by all Users who are securing a document. This is done in File Cabinet Setting by the Administrator as shown below. First shown is how the user can use the default password.
Below showing how to set a Default Password for all users in a File Cabinet.

Searching for and Opening a Secure or Password Protected document or file. When you search for a password protected document or file it will be displayed as normal in your search grid. The only difference is a document that is protected will be highlighted in a little bit of red as shown below. When you select to open this document you will be asked for a password. If you cannot
remember the password you can request the password from the System Administrator as shown in second image.

Secure or Password that was forgotten has to be requested first from the System Administrator. The password will be returned to you when the system administrator has acted upon your request. It is not an automatic process. If they do not respond then you will not get back the missing password. Once they do respond you will be able to access the missing password and open the document by clicking on the "Lock Icon" first. The following screen will display and you will be able to view password and open document.
Special Features  Records

Records are a “master” record which you can create “outlook” like contact information, attach documents to and keep notes contained within. Records would be a sub file cabinet folder to your main file cabinet but so much more.

For example if you used “records” for accounts payable. You could contact the customer about the accounts payable while viewing the entire document history about that transaction it could include the accounts payable document, purchase order, deliver receipt etc. In addition you could review all notes related to this client in a date order. You could view a specific note related to the collection about this accounts payable. These notes are all digital to begin with and can be associated with this specific record.

Another example of records could be for “client” files. These files could then be associated with a specific client and cataloged and indexed as such.

**TIP:** To begin to use records you will first have to create a “records” field within your file cabinet. You do not have to use records within your file cabinet therefore it is something that has been put into use by you the user. These are the steps to begin to use records. Please see the steps below.
To begin to use records first go to Modify File Cabinet > next (see steps below)

At the bottom of Modify File Cabinet you will see Modify File Cabinet Controls. This is where you will create a “records” field. You do that by first naming your field (FIELD NAME) it can be any name but should describe the entire groups of records and what they are. Next you will select “field type” for this you should select Record.
Now that you have created a record in Modify File Cabinet Controls this will now show up when you select Add Single Document. Now when you Add a Document you can also attach this document to a specific Record. An example shown below.
When creating records no two records can have the same name. Also the “record name” is what will show up in the Add Single Document screen and is also the official name of your Record.

Here is an explanation of the different functionality within records.

**Record Name** - this is very important because record name (only) is what will show up when you add a document. When adding documents you will be given a choice to attach it to a record. The Record Name is the only bit of information you will see. Another note about Record Name is that Record names cannot be identical. It will be up to you the user to decide how this can be accomplished. For example you have a medical office and have a 5 clients named "john smith". For the record name to accomplish this you may want to have a combination of the name and maybe their street address - for example John Smith- 233 Main, John Smith-331 Maple, John Smith-77-Spruce etc...

**Save and New buttons** - To create a new record you must click "New" - you can then begin the process of creating your new record. When complete you must press Save. Also as you add notes to Records you must click Save to save those new notes. Save must be clicked each time you update a record.
Address Info - This is a location similar to Microsoft Outlook or other contact management software where you can put specific information about a given record. It does not have to be people specific; you could be describing a company, a client, a vendor, a piece of equipment, a property.

Notes and Notes boxes - When you create a specific record along with that record will be created the ability to create notes and store them specific to that record. These notes can be entered digitally and will also be date stamped when they were created. Once a note has been entered you must click SAVE to have the note added to this record. You can also go to the notes tab to review past notes or to edit an existing note. From the Notes tab you can also export the notes for viewing outside of Speedy Organizer.

Documents - During Add Single Document or other ways to add documents into the Speedy Organizer you will be provided with a "form" as to how the documents will be cataloged and indexed. Once you have created a record field in Modify File Cabinet and began using Records you will have the ability when Add Documents to "attach" documents to a particular record. You do this during Adding Documents and selecting the record you want to add the document too. Once the Documents have been added to a particular record you will then be able to Open that record and click on the Tab for Documents. This Tab will enable you to view the documents they have been cataloged under this specific record. Similar to other document searches you can then click at the top of the headings to organize the documents by certain record types, alphabetically, date order, etc... From this screen you can also export document reports and also email documents directly from this screen using Microsoft Outlook.

Active and Inactive - and is active check box - By selecting or UN selecting the check box you can make a record active or in active. Once you have made a record active or in active it will show up in a list related to that heading.

Search - Searching within the records interface searches on the following things - the name of the record and also any notes that is all. To do enhanced searching go to the main Speedy Organizer gadget here you can search also for records but in addition via full text, advanced searching and date searching. You cannot search for notes from the main gadget. You can only search for notes from within the Records screen.

Outlook - Drag and drop contacts from Outlook to auto fill the information into records see below screen.
How to create a record

To create a new record first start by clicking NEW. When you are done creating your record click SAVE.

How to use notes in Records

To create a note in Records start at your main screen as shown above. When you are done with your note click SAVE. To view notes or several notes click on the Notes tab as shown here. Now you can view or edit or update or export existing notes.
Using documents in Records.

Documents are attached to a record by using one of the many ways to Add Documents. Once a document has been attached to a record you can view those documents here in Documents. You access this by clicking on the documents tab and then by locating the document which you would like to view. The documents though attached to a record are still searchable by any of the standard searching which is supported within Speedy Organizer. The attachment of the document to a specific record is for providing this document contained within the Records environment. As supported in other Speedy Organizer searches you can email, copy and paste or export to excel a document report.
Searching in Records

When you are searching in Records you are not searching on any documents. You are searching only on the Record Information that is the Record Name, contact and address info and notes. When you search a result will yield below the search relevant to that search term. It will show you what records have the search term in it. For example if you searched for Main. Results would be yielded for both Main Construction Company and Fred’s Nursery at 123 Main. It also searches in notes so if the word “main” was in notes it would display that record too.
How to import contacts from Outlook into Records

You need to have both applications open for this to work. Open up outlook and open up Records in Speedy Organizer. Now just drag your contact from Outlook (1 at a time) and it will auto fill the information into Speedy Organizer.
Tools and Settings Overview

Tools are the area of the software which provides your control and the ability to customize the file cabinets and system as it relates to everything at your organization. Tools is broken down into four parts Admin Settings, File Cabinet, Scanner-Copier and Help Support.

Tools start screen

You can click on the gray boxes to get help resources for Speedy Organizer.

Admin Settings

1. Open Repository
2. Delete Document
3. Registration
4. Logger Information
5. Firewall Settings
File Cabinet

1. Modify File Cabinet
2. Create File Cabinet
3. Backup and Restore/ Delete
4. Auto Document Process aka Data Import
5. Import Folder
6. File Cabinet Settings
7. Logout

Scanner-Copier-Fax-Folder

1. Scanner Import Others

Help Support

1. Online Help
2. Help
3. About

Each of these options is described below in detail.
Tools > Admin Settings

Admin Settings

1. Open Repository (shows you location where documents are stored)
2. Delete Document (delete documents no longer needed or in use)
3. Registration (advises if software is registered)
4. Logger Information (logs the user’s activity in the system)
5. Firewall Settings (provides access for application through firewalls and ports)

Admin Settings are only accessible to the administrator. User and Authors will not have access to this section. If you feel you need access to this section please contact your administrator and ask them to provide you access.
Open Repository

Part of Tools > Admin Settings

Selecting open repository takes you to the location where the documents are being stored for the file cabinet which you are logged into. You can have a different location for each file cabinet you have. IMPORTANT NOTE: Do not delete documents directly from the repository as it will cause errors in your search. To delete a document use the delete document utility as described below. IMPORTANT NOTE: Your repository should be backed up daily. This is the location of where your documents are stored. Make sure that your backup is redundant and backed up both on and off site. Please consult your network administrator as to what is the best process for backing up these repository folders. In Speedy Organizer the repository folder is not backed up just the file cabinet database is.

Delete Document

Part of Tools > Admin Settings

Next select delete from the right hand side for each document you want to delete. Note this process is not reversible so make sure you want to delete the document before proceeding.
Registration

Part of Tools > Admin Settings

The Speedy Organizer software must be registered for it to work. You must be connected to the internet to complete the registration process. In the event you cannot complete the registration process online you must call Speedy Solutions and ask for technical support for assistance with registering the software.

Once the software has been installed each time you start the software you will be prompted to complete your registration with Speedy Solutions. (See registration section 4.0 pages 10-12 at the start of this manual for more information on how to register).
Audit Trail and User Logging
Part of Tools > Admin Settings

User Information - Logger Details and Audit Trail

To access the Logger Settings go to Tools > Admin Settings > Logger Information

Speedy Organizer supports three types of users for auditing the system Administrator, Author and User. Below are the differences between each of these users.

- **Administrator**
  - The administrator has full rights to all functions and features in the system including but not limited to creation and deletion of databases, creating users, uploading documents and searching documents.

- **Author**
  - The author has full rights to all of the functions and features in the system excluding the Database section. This means the author can NOT create a database or delete a database or alter a database. The author can still upload documents and search documents.

- **User**
  - The user can only search documents and has no rights to do anything in the system. They cannot upload documents into the system, users can SEARCH only.
AUDIT TRAIL LOGGER INFORMATION

Speedy Organizer maintains a detailed logger information based upon many details in your system including

- Users
- Machine Name
- Process Type
- Process Time and Date
- Process Description

These logs can explain what user accessed a document, when they accessed a document, what process was involved when the document was accessed (was opened). The logger information for Audit Trail can be exported to text or excel for viewing or search.

To perform this view Login as the Admin and then select a date range, selection can then be made for View or Export.

Firewall

Part of Tools > Admin Settings
File Cabinet Overview

File Cabinet is your control over the filing structure of your cabinet and settings associated with it.

File Cabinet consists of:

1. Modify File Cabinet - how to change the filing structure for your cabinet
2. Create File Cabinet - how to create a new cabinet
3. Backup or Restore or Delete - how to backup, delete or restore an existing cabinet
4. Auto Document Processing or Import Data - how to import records directly into the file cabinet from scanning software.
5. Import Folder – Imports and entire folder structure into a Blank File Cabinet
6. File Cabinet Settings - set features and controls on this specific file cabinet
7. Logout - logout and login to another cabinet

More description of each is provided below
Create File Cabinet

Part of Tools > File Cabinet

Create File Cabinet continued
Another way to create file cabinets and may be quicker for administrators are Create File Cabinet which is offered in the Tools menu. This is just a one page offering which was explained above for the allowable choices. Here is a screen shot of that page.

TIP about Templates: Templates in Speedy Organizer are based around common types of small business such as lawyer, medical office, insurance, accountant, builder etc.. and another group related to business processes or departments such as accounts payable, human resource records etc...., not sure what you need or your business type is not showing up - select the "blank" template and then after creation go directly to Modify File Cabinet. You can then switch back from Modify File Cabinet to Add Single Document to see how you file cabinet is being created. The File Cabinet ultimately becomes the way you file documents away and search for them.
Create File Cabinet continued
Below are shown some file cabinets examples for Accounts Payable and a Tax and Accounting Firm. These can always be changed or modified using Modify File Cabinet in Tools

Accounts Payable Template

![Accounts Payable Template Image]

Tax and Accounting Firm

![Tax and Accounting Firm Image]
Backup Restore Delete File Cabinet

Part of Tools > File Cabinet

Backup File Cabinet

Backup File Cabinet is for backing up the file cabinet you are logged into. You must backup each file cabinet by first logging into it. You must backup each file cabinet individually. When you backup a file cabinet you are backing up the file cabinet database. YOU ARE NOT BACKING UP THE DOCUMENTS you must backup the documents with another technology as this is not done in Speedy Organizer. The documents are just plain documents or files in a folder and can be backed up with backup software or utilities or online backup.

By default the backup of the file cabinet will go to the Microsoft SQL server program files. These files should be backed up also in your standard Drive backup. In addition you can select and additional copy of the backup be sent to the Speedy Organizer Repository Folder you do this by going to File Cabinet Settings and selecting the check box for this feature. Backup of file cabinets will be required for restoring file cabinets not working properly. Make sure you backup the Speedy Organizer File Cabinets regularly at a minimum of once every 3 days.
Restore File Cabinet

To restore a File Cabinet database you must first be logged into the database that you want to restore. For example if the database you want to restore is acctpayable, you must be logged into that specific database. You cannot restore a database to a differently named database. The database name and .bak restore file must be named the same. If you have lost the database for some unknown reason, please contact technical support at Speedy for assistance.

These are the steps to restore a database -
1. Login to the database that you want to restore
2. Find the backup file for that specific database - the backup file and the database you are logged into should have the same exact name.
3. When you have located the file click Restore.

Note: Backup files are located by default in c:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

See also - Using Microsoft SQL Studio Management Tools to manage database files.

Delete File Cabinet

Delete File Cabinet is a one step process to delete a file cabinet that is no longer in use or needed. You must be logged in the file cabinet to delete it and you must have administrative rights to perform this. To Delete a file cabinet Go to > Tools > Delete File Cabinet > select
Backup Document Repository

**Backup Document Repository** is a one step process to copy the contents of your document repository to another location. This is an actual copy of the documents themselves. Depending on how many documents you have this may or may not take a long time. **To Delete a file cabinet** Go to > Tools > Backup and Restore and select as shown below in green
Import Folder

Please see the import folder section under How to add documents to Speedy Organizer
File Cabinet Settings displays the following

1. **The repository path to where the documents are stored**
   This displays the path you originally selected to store the documents. This path cannot be changed.

2. **The common name of the File Cabinet**
   This is the name of the file cabinet which appears within the Speedy Organizer start screen. It is the name of the file cabinet.
File Cabinet Settings continued

3. The Nospaces NoCharacters name of the File Cabinet – also the name of the folder where
the documents are stored, and lastly the database name of this file cabinet in SQL and Speedy
Organizer program files. This is the nospaces nocharacters name of the file cabinet you
selected when you first set up the file cabinet using the file cabinet set up wizard or the create
file cabinet.

File Cabinet Settings allows you to:

1. Require or not require login to a specific File Cabinet
If you select login required each user will have to Login to the file cabinet. If you unselect this
option then the user will not have to login, they will not see the login screen requiring name
and password and you will not be able to use workflow for this cabinet.

2. Enable or Disable Workflow for a specific File Cabinet
Workflow can be either turned or turned off here.

3. Set Backup to leave an additional copy of the back up in the repository folder.
In the Speedy Organizer the backup is set to go directly into the Microsoft SQL Server Program
Files. You should be backing up this location regularly. In addition you can set Speedy Organizer
to provide an additional copy of the backup to the document repository folder. Please check
your computer settings to see if you have permission for this procedure.

4. Rename Files as they are uploaded
Each time a file is uploaded into Speedy Organizer we not only upload the file but we rename
the file also with whatever keywords that you selected. For example if you selected Client
Name: American Company and Invoice #: 4457 and Date: 03/10/2011 the file would look
something like this American_Company_4457_03_10_2011_10:13am_.pdf. What is so good
about this feature is the document then is visible even if you are not using Speedy Organizer. It
makes sure all your work cataloging and indexing stays with each individual document.

5. Do not Rename Files as they are uploaded
You can turn off the file name as described in 3 above.

6. Set attached view to Document Filing Screen
As you see when you select Document Filing the document will open up in its native program to
the right hand side of the screen. If you select "attached view" the document will open up in a
viewer. PDF documents will most likely always open in the viewer. Other documents may or may not depending on your computer settings. If they do not open in the "viewer" consult the Speedy Organizer forum for more help and information.

7. Set how many documents you want the grid view to be enabled for by default it is 0.

8. Secure Document – this will enable you to put a password on certain documents. When opening these documents a password will be required. Note any document requiring a password is not stored in the “repository” instead it is stored in the database. Please provide any additional security to the database as required by your IT staff or IT consultant to insure the level of security that you need. If a password is lost it can be requested and provided only by the System Administrator. To recover a lost password sign on as the system administrator and go to recover password in the Tools section > you can then send the password back to the user requesting it.
Scanner – Copier – Fax – Watch Folder
See Scanner – Copier – Fax – Watch folder for how to set up your scanner or copier to work with Speedy Organizer.

Scanner – Copier - Fax – Folder

Speedy Organizer does not directly “scan” documents into the application. Speedy Organizer “imports” scanned documents from any scanner, digital copier, multi-function machine, fax (which faxes ultimately reside in a file folder) or watch folder. We will discuss about this more here.

Setting up your scanner, copier or multi-function to work with the Speedy Organizer. Any scanner, or copier or multi function can scan a document to a “file folder” somewhere on your computer or network. First find the location where the scanner, fax or copier currently scans the document to. You would find this location not in Speedy Organizer but instead just scan a document with your scanner and find out where the document goes to – what folder did the scanned document end up in? When you have determined where the documents are scanned to this is the location you want to set the Speedy Organizer Scanner Import to. First go to Tools > Scanner Import Others . The following screen will appear shown below.
Scanner copier fax continued

Next select browse to go to the same location (the folder) where you scanner-copier-fax end up in after they have been created by your scanner or copier, fax.

That’s it you are done.

Now scan as much as you want and when you are ready to import those documents follow the steps below. You must do the below process for scanned document to come into Speedy!
Scanner Copier Fax continued

Click the scanner import – as shown and all scanned document will automatically come in.

You will get a message telling you all have been imported properly.
Scanner Copier Fax continued

Next > You will be asked do you want to file now or later?

click yes to start filing
Scanner copier fax continued

Start filing by selecting the first document- use auto load form there.
Help Support
There are many help resources available to you as a Speedy Solutions Inc. client including, a help forum, a ticket system where you can ask questions, a help manual (this document), a static help accessible within the software and help videos.

Online Help
Tools > Online Help – you can also get the most recent videos and guides from this link.

Help
Tools > Help will take you to the static help for the software

About
Tools > About will provide information about the software and the amount of registered licenses for a multi user system.
Using System Administrator

System Administrator is a user within the Speedy Organizer which can create new users, control users and allow or deny access to users to certain file cabinets.

Explanation of the System Administrator

The System Administrator is a user who can control all other users within the Speedy Organizer. This user should be someone with the highest level security because they will be the user who administers all other users.

Accessing System Administrator

Next ...
The default Login is

User Name: SysAdmin
Password: sysadmin

You can change this password after you login the first time.

Next.....

Once you have logged into the file cabinet next select the “Tools” from the main gadget as shown above.
Creating users with System Manage Users/Security

Manage user and security is **file cabinet specific** that is for each file cabinet you can allow access or not to each of the users. Users will only have to be setup once. The users under the system administrator setting can then be allowed access or denied access to certain file cabinets. The users once created can use the same password to login to all file cabinets. You can also select not to have any security on a particular file cabinet but in that case no login will be required and for that cabinet **workflow cannot be used.** To use workflow you must have Login enabled. Both workflow and login options are set in the **File Cabinet Settings** described below.

**IMPORTANT NOTE about Security:** The documents with Speedy Organizer reside in a Microsoft File Folder somewhere on your system. This allows you to in addition to the security which is supported within Speedy Organizer to allow you to utilize all of your standard Microsoft security and Microsoft network security.
You manage security in two areas of Speedy Organizer. In File Cabinet Settings you can enable LOGIN once enabled you will then set up users and security in this section.

Manage user and security continued
Manage User and Security - how to create a new user

Login to the database as the administrator > next select Tools > next select Manage User and Security >

At the bottom of the screen select New, you can now select a User Name, Password and User Type. Here is a description of the user types below.

**System Administrator** – Full access to the software and controls user creation, security and access.

**Administrator** - Full access to software and Tools but is not the System Administrator

**Author** - Can upload documents and can search documents but has no access to Tools

**User** - Can only search documents in Speedy Organizer

Once you have setup a user you select **Save** and the user will show in the above screen.
You can also make a user Inactive by selecting the user and then selecting Inactivate.

To view the different users select User Type from the top drop down menu. You can then change or update the users from this screen. (see screen shots below)

How to view users in this File Cabinet select from drop down list.

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Manage user and security continued
Before your create a user let us review the different types of users

**Administrator** - Full access to software

**Author** - Can upload documents and can search documents but has no access to Tools

**User** - Can only search documents in Speedy Organizer

How to create a new User -
To make a new user first login as the Administrator next select "User Type" from drop down list next type in the User Name and next select Password for User.
Providing Users access to File Cabinets

Once a user can be created in "Manage User" the system admin can Allow Access to certain file cabinet and templates.

The system admin does this simply in three steps.
1. Select the User from the top drop down list.
2. Move the file cabinet you would like to allow access to from "Available" to "Allow Access" using the arrows.
3. Allow access to templates if you are using this functionality.

To change or reverse access you can select the user and move the file cabinet from "Allow Access" to "Available".
File cabinets have been set up and users are using the different file cabinets to store documents. Some of these file cabinets may have “password security” over certain documents. Two important notes for you as the system administrator to know. One the documents that have been provided “password security” do not reside in the “repository” instead these documents and only these documents (files) have been moved into the SQL database. They will not show up in the repository nor can they be accessed for a full text search. The documents are secured and reside in the database. Once a file has been selected to be opened the user will have to enter a password. In the event the user has forgotten a password the user can request the password from and only from the system admin. If the user has made a request for a password from the system admin it will show up on this screen. The system administrator will then be able to resend this document (file) back to the user who requested it. Now when the user selects to open this document the password will show for 1 time. The user will also be able
to open this document for viewing. This password recovery can only be administered by the
system administrator and no other user.

### Templates for Auto Document Processing

This functionality works for the creation and storage of “templates” to auto process
documents. This works with partner software such as Kodak Capture software. See
**Auto Document Processing** for more on this feature. The point is the system admin can create
and then provide access to or deny access to certain templates. This concept is the same as
assigning a user rights to a file cabinet. It is done in the same section as assigning rights to a file
cabinet.
The system admin can create templates. These data import "templates" are for use with specific Scanning Capture software manufactured by Speedy Solutions partners such as Kodak, Kofax, Digitech, EMC Captiva Pro and others.

Please contact your Speedy Solutions inside representative if this something you would like more information on.

Once a template is created it can be provided to users to "import" data into Speedy Organizer using some of the above mentioned solutions.

Once a template is created it will show up in Manage Security and the system admin.
Registration of Speedy Organizer

The Speedy Organizer software must be registered for it to work. To register the software you must be connected to the internet to complete the registration process. In the event you cannot complete the registration process online you must call Speedy Solutions and ask for technical support for assistance with registering the software.

Once the software has been installed each time you start the software you will be prompted to complete your registration with Speedy Solutions, until you complete registration the screens will continue to appear. These are the screens and the process which will follow.

It will take you to a website to register

You will then receive two emails one thanking you to register and later an email with the activation code.
Registration continued

First email - Thank you email

Dear Speedy Solutions Customer,

Thank you for registering with Speedy Solutions. Your request is under process. You will get an Activation Code within 4 hours.

Regards,
Speedy Solutions Inc

2nd email will send registration code

Dear Valued Customer,

Your Registration Code is: NbBZ3b/7LWhxhG0mBDS77MBm1g0ceC8SyRG3w6pq/A=

At the customer service team for Speedy Solutions Inc., we’d like to sincerely thank you for choosing our software and let you know we appreciate having you as a customer.

We have many resources available on our Web site. Drop by anytime!

* To help you use the software, we have tutorials and technical support.
* If you want to be notified of new software updates and promotions, or to learn how others are using Speedy Solutions Inc., please subscribe to one of our monthly newsletters.

We’re interested in your feedback – please don’t hesitate to contact us with questions or ideas.

Thanks again for your purchase!

Sincerely,

Rev 4.9.2013