
DocumentMall™ Express Quick Reference Guide



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The contents of this User's Guide are subject to change without notice.

Visit www.documentmall.com for the latest version of this documentation.

Folders

Create folders

To create a folder:

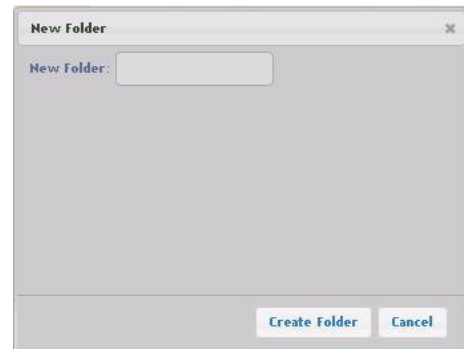
1. Select and access the cabinet where the new folder is to reside.
(You can create additional cabinets when logged in as admin.)



2. Click the New Folder link.



3. Type the name of your folder on the Create Folder pop-up screen.



4. Click the Create Folder button when finished.
Your folder will display in your cabinet.

- You can click on the folder to access it. If you have permission, you can import files into this folder.



Folder tools

After a folder is created, you click on the tool icon to review folder information, rename the folder, or delete it.



Upload documents

To upload a PC generated file into a DocumentMall Express cabinet or folder :

1. Navigate to the cabinet and/or folder where you want to upload a PC file and click the Upload Document link on the task bar.



2. Click the Browse button, navigate to the file on your PC or share drive and select it. The file name will appear in the Upload Document field.
3. Click Upload. The file will appear in the DocumentMall Express folder or cabinet

In addition, if your account supports Document Types, or if you have an existing DocumentMall account, you can index the uploaded file.

- Select the appropriate Document Type from the drop down list.
- Type in the index data in the document type fields.
- In the example below, Invoice Document Type is select. You can type in an invoice number and vender name, and click Upload.

Note: Document Types cannot be created using DocumentMall Express. They can only be created by accessing the full-function DocumentMall.

Download documents

Documents can be downloaded from DocumentMall Express to your PC for viewing or editing.

To download a document:

1. Navigate to the location of the document and click the filename/icon.
2. You will be given a choice to open or save the file. *In this example*, if you select Open with, the document will display in Microsoft Word.



Browse Folders

To browse files within folders:

1. Click the Browse tab on the main page, navigate to the desired cabinet, and click the desired cabinet.

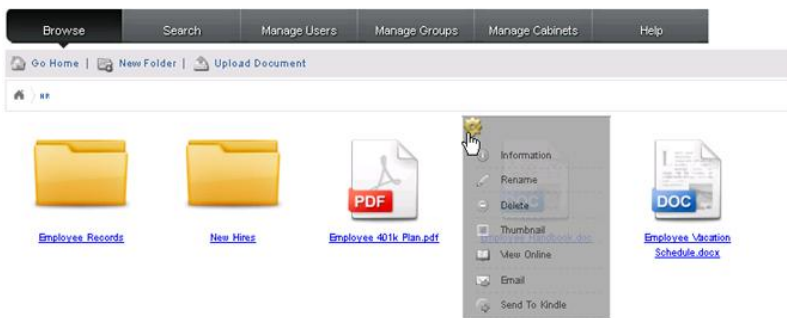


2. Click on the folder and browse the files or folders located within it.



Document Options

By clicking on the option icon for a document, a user can view document property information, rename the file, delete a file, view a thumbnail, use the online viewer to view the document, and email the file to an email address or Kindle device.

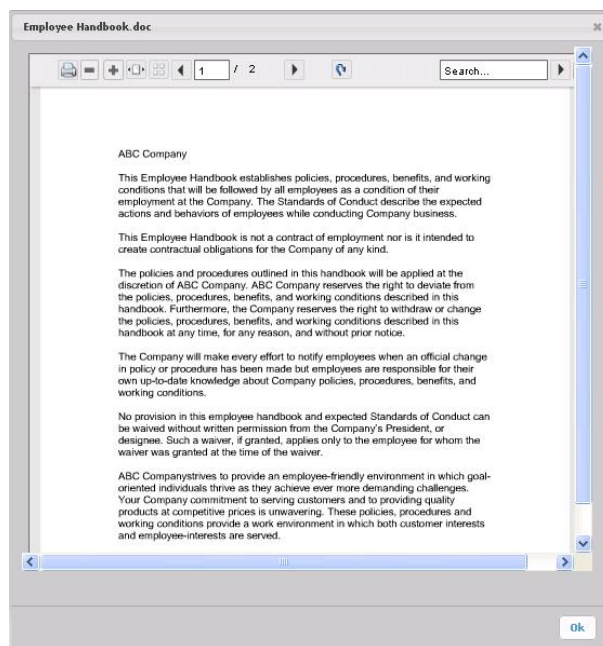


View Online

DocumentMall Express has an online view tool that allows you view documents without downloading the file. View Online allows you to print the file, increase or decrease the viewing size, navigate to other pages, rotate a page, or search for text within the document.

To use the View Online:

1. Click the Options tool icon and select View Online. The file will open in the viewer.
2. Click OK to return the main page.

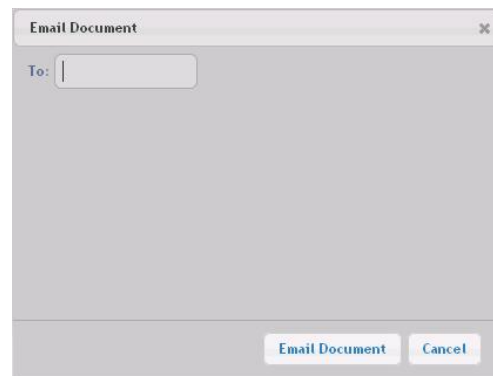


Email a document

With DocumentMall Express, you can email a document to a specific email address or Kindle device.

To email a document to an email address:

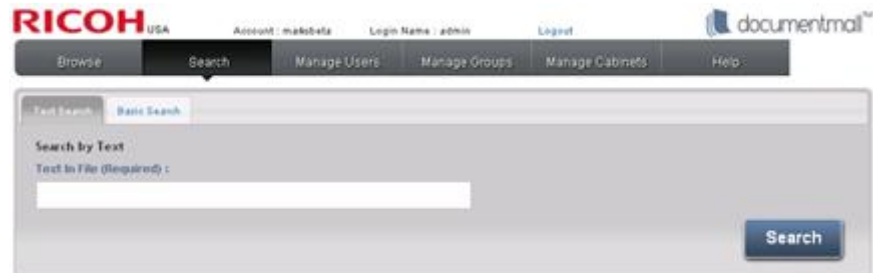
1. Select Email from the document Option tool icon.
2. Enter the email address of the desired recipient and click the Email Document button.



Search

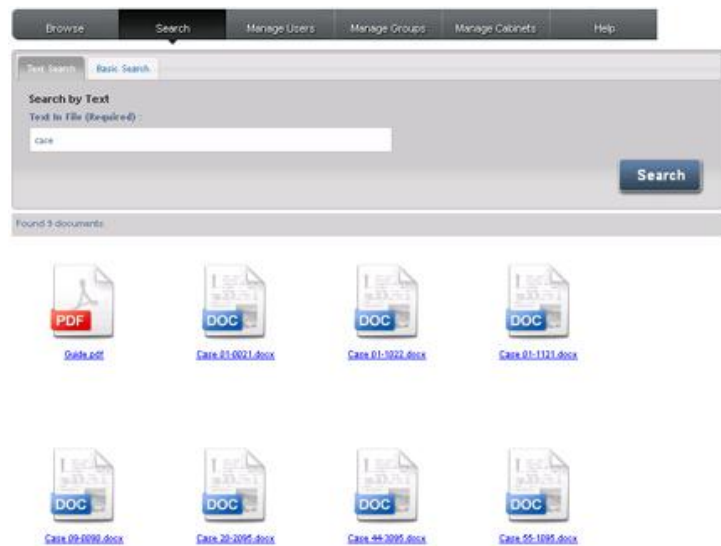
Text search

DocumentMall provides a full-text search tool that allows users to search for documents a variety of ways. A simple search matches a search word(s) against indexed text and against text properties.



To search for a file using text search:

1. Click the Search Tab from main Express screen. The Search screen appears.
2. Type in the word or words to search for and click the Search button. Files associated with your search will display.



Index search

Index search is a search option that takes advantage of Document Type indexing. (This option is only available if you set up Document Types in full function DocumentMall).

To use the Index search:

1. Click on the Search tab on the main page, and select the Index Search option.

The screenshot shows the DocumentMall interface with the 'Index Search' tab selected. The 'Search by Index' section has 'Document' selected in the 'Document Type (Required)' dropdown. The 'Index Fields (optional)' section is empty. A 'Search' button is visible at the bottom right.

2. Select the appropriate (Required) Document Type from the drop down list.
3. The index fields associated with the selected Document Type will display.

The screenshot shows the DocumentMall interface with the 'Index Search' tab selected. The 'Search by Index' section has 'Invoice' selected in the 'Document Type (Required)' dropdown. The 'Index Fields (optional)' section shows 'Invoice Number' and 'Vendor Name' input fields. A 'Search' button is visible at the bottom right.

4. Type in your search values and click the Search button. Files that are indexed with these values will display.

Other Resources

In order to utilize all the features and functions of DocumentMall Express, additional resources are available to you. The Help tab on the navigation bar provides online help for Administrators and Users regarding all the capabilities of Express.

By clicking on the Resource tab, you have access to Administrator and User reference guides, and access to options such as Replicator, iPhone, iPad and BlackBerry apps, and Google Gadgets.

