



v5.1.0

USER UPGRADE GUIDE

organise*it* v5.1.0 USER UPGRADE GUIDE

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HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

Keys


The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the [Enter] key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as [OK] or [Cancel].

Key Operations

Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the [Ctrl] key on the keyboard and at the same time press the letter [C].

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

Buttons

The buttons will be shown as an image. For example the [OK] button will be indicated by . If a button has a shortcut key then this will appear in a pop-up box when you hover the mouse pointer over the button. For instance, when you hover over the [OK] button, the pop-up box indicates that the shortcut key is [Alt] + [O].

Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

CAUTION: Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

NOTE: *Please read. A note is a hint or advice that helps you make best use of the software and/or it may also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.*

INTRODUCTION:

organise*it* v5.1.0

The new version of organise*it*, version 5.1.0, has experienced a number of changes, summarised in this manual. Some of the changes that you, as a user, experience might relate to the following functionality:

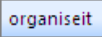
- creating new folders at the time of saving a document
- checking out a document
- copying files to a clipboard to make them available outside of organise*it*
- saving a document to your system, not to organise*it*

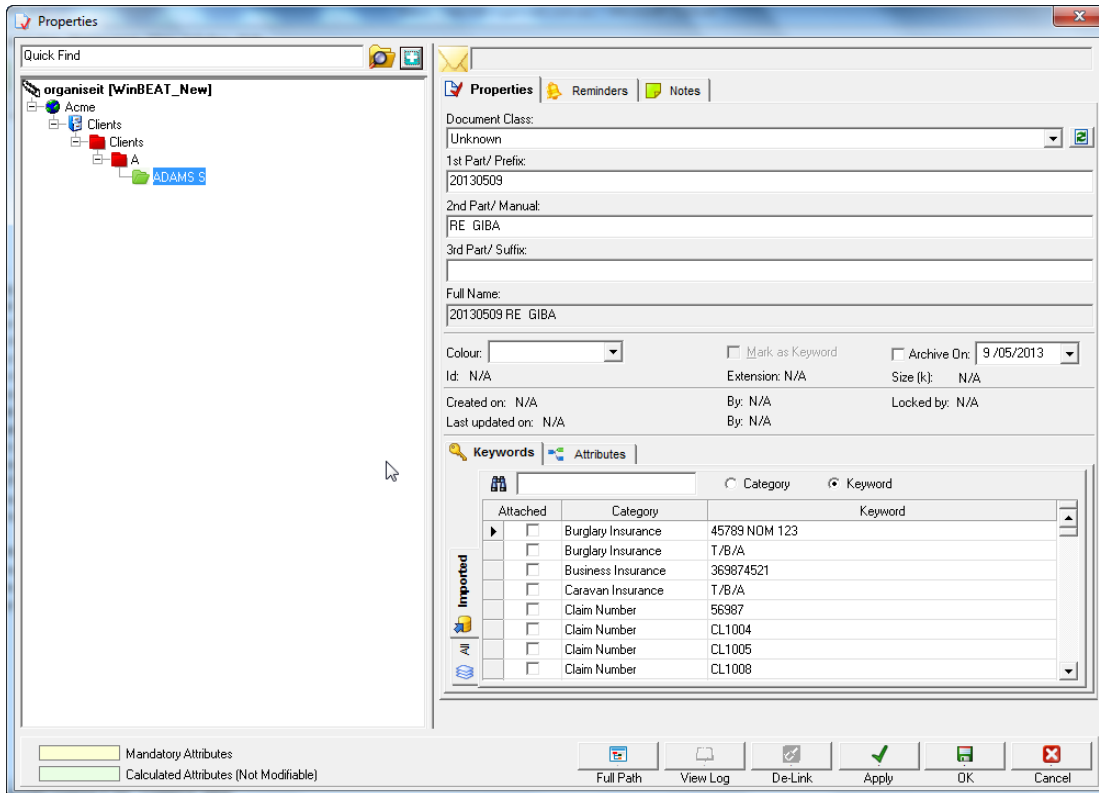
NEW FEATURES

The new version of *organiseit* contains a number of simple, new features or enhancements which we will look at here. They include creating folders as you bring a file into the database, double-clicking to check out documents, copying documents directly into an email to send to others and a file safety enhancement when cancelling the process of bringing a document into *organiseit*.

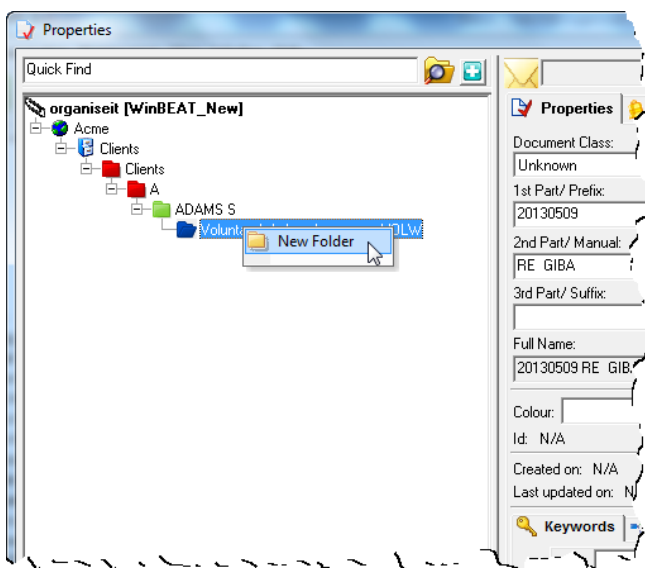
CREATING FOLDERS ON THE FLY

As you are bringing documents into *organiseit*, you are now able to create new folders as you need them - or “on the fly”. This means that if a specific folder does not already exist, and you are in the process of bringing a file into *organiseit*, you can create the folder mid-process.

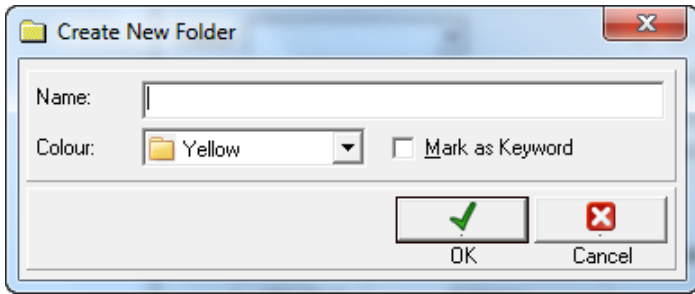
- 1 From Microsoft Outlook, or another application, select a file and click on [organiseit]  to send the file to *organiseit* and display the *Properties* dialog box



- 2 Right-click on the location where you want the folder/subfolder to be created, to display the shortcut menu

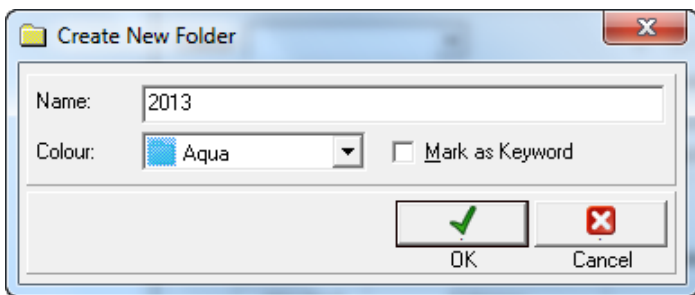




3 Select **New Folder** to display the *Create New Folder* dialog box

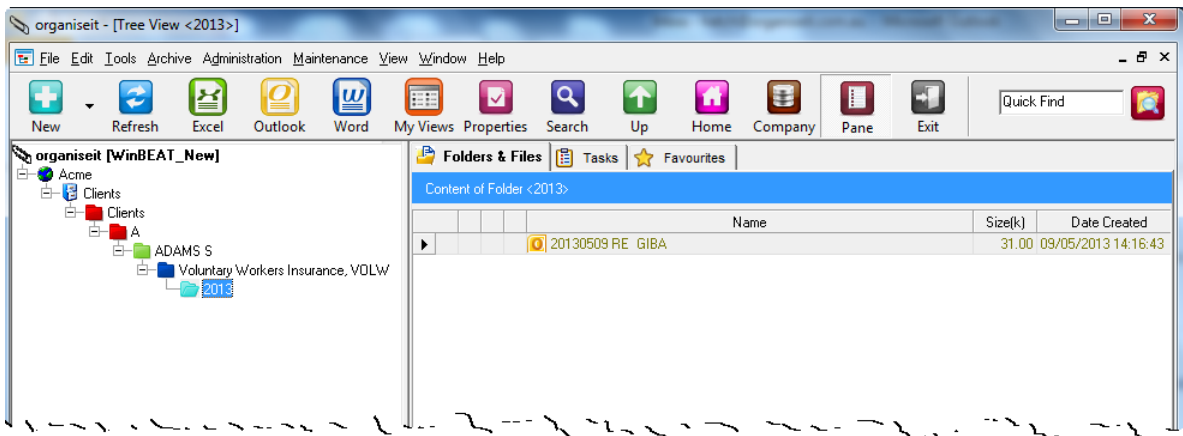


You could also have clicked on the **Create New Folder**  tool to display this dialog box directly...

4 Type a **Name** for the folder, then select a different **Colour** if necessary



5 Click on **[OK]**  to create the folder and return to the *Properties* window, then click on **[OK]**  to save the file in the new folder

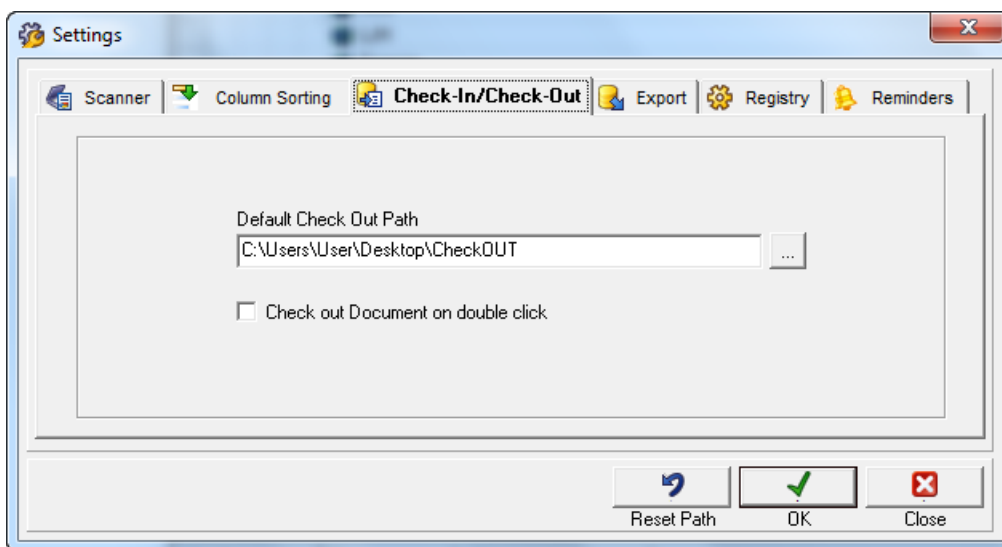


DOUBLE-CLICKING TO CHECK OUT DOCUMENTS

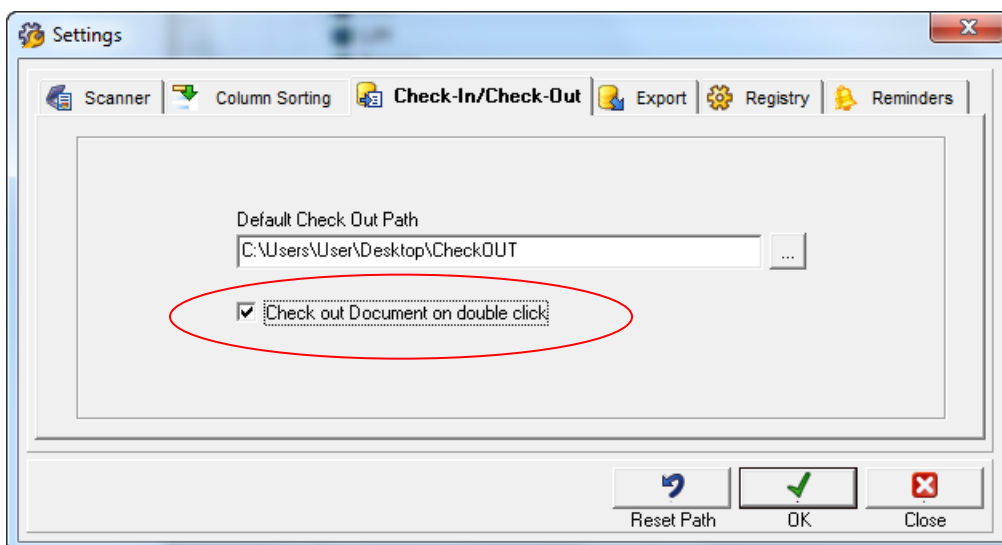
A feature enhancement in *organiseit* 5.1.0 is the addition of a setting that enables you to double-click on a document to automatically send it to the **CheckOUT** folder on the desktop. Here you are able to open and work with the document, saving the changes and then checking it back in to the database when you have finished. This feature is particularly useful for those users that tend to keep documents open for longer periods of time or those that have a less reliable network. In the case that a connection to the network is lost, any changes to the document will not be as vulnerable to loss because it is checked out.

- 1 Click on the **T**ools menu and select **S**ettings to display the **S**ettings dialog box, then click on the **C**heck-In/**C**heck-Out tab to display the options

Notice the new Check out Document on double click option...




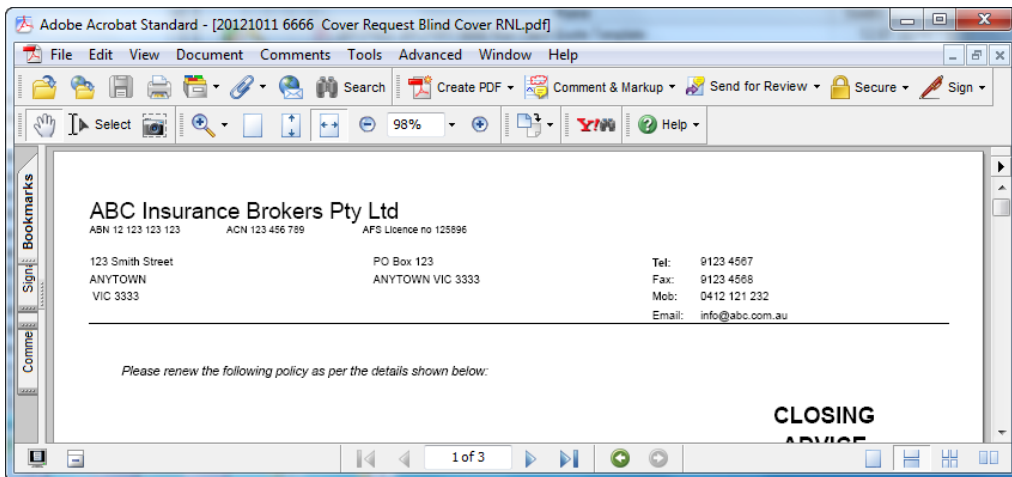
- 2 Click on **C**heck out Document on double click until it appears with a tick




- 3 Click on [OK]  to accept the changes

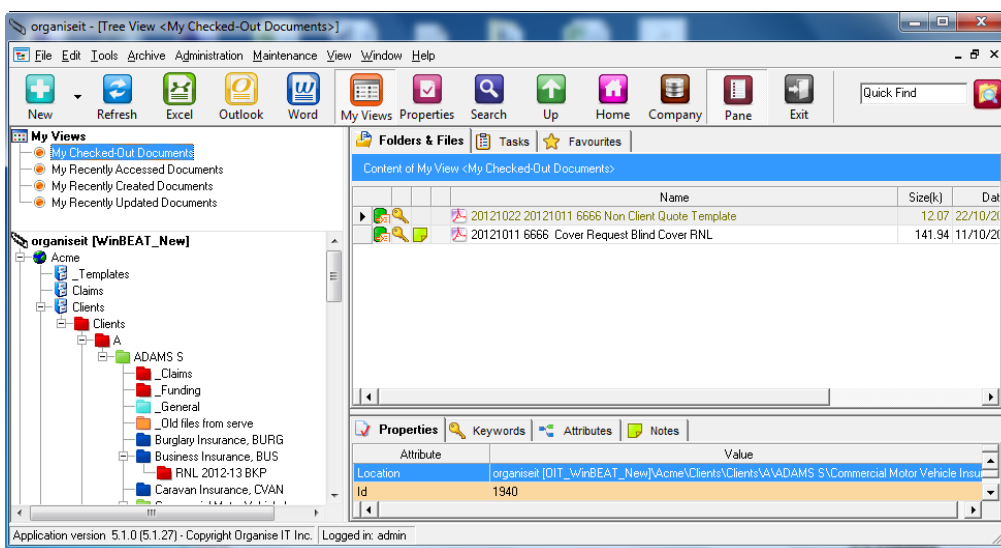
There won't be any obvious change until you double-click on a document...

- 4 Locate a document and double-click on it to display the **Select Folder** dialog box, then click on [OK]  to open the document



Let's open another document...

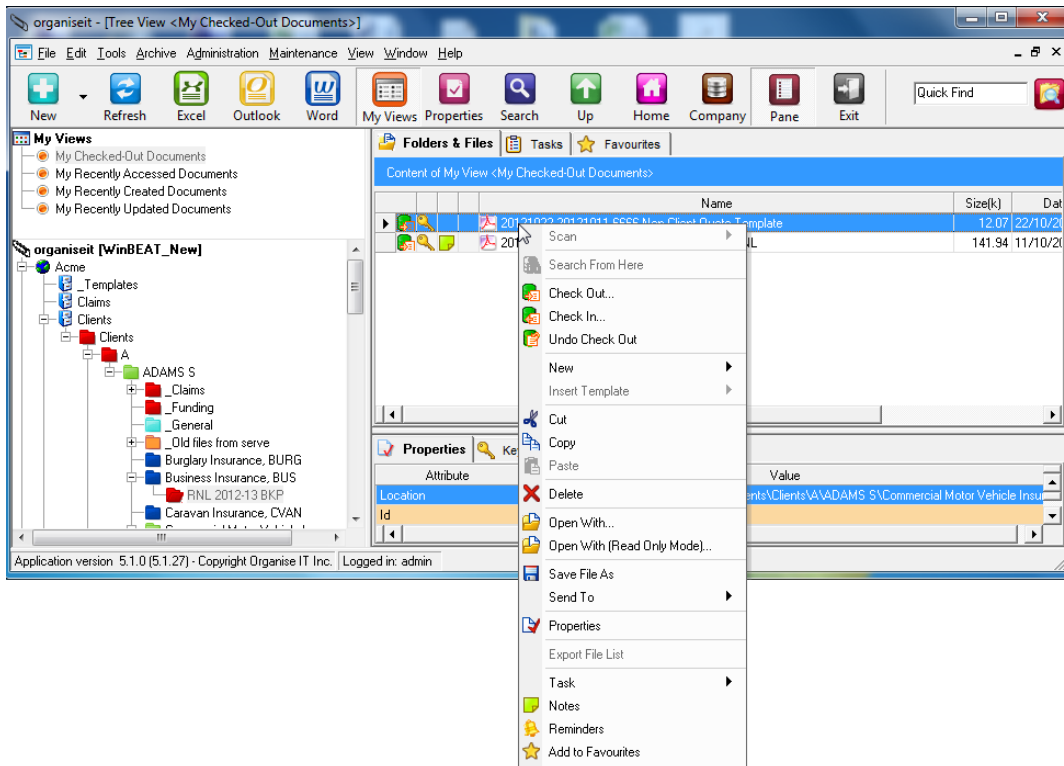
- 5 Repeat step 4 to open another document
- 6 Return to the organiseit window and click on **My Views**  to display the **My Views** pane, then click on **My Checked-Out Documents** to view the two documents just opened in the right pane



You can also view all the checked-out documents by opening the **checkOUT** folder on the desktop.

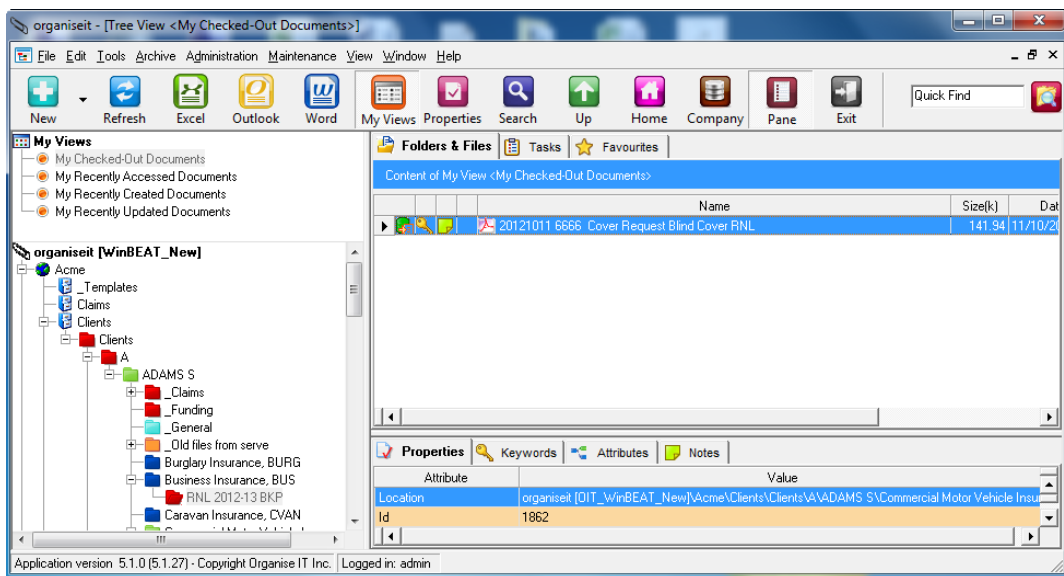
Let's now check the documents back in - normally you would probably have had the documents open longer and have made changes to them, but we'll skip that part...

- 7 Ensure both documents are closed then, in the **My Checked-Out Documents** pane in the organiseit window, right-click on one of the checked-out documents to display the shortcut menu



8 Select **Check In** and click on **[OK]**  to check the document back in

It will now disappear from the Checked-Out Documents list...



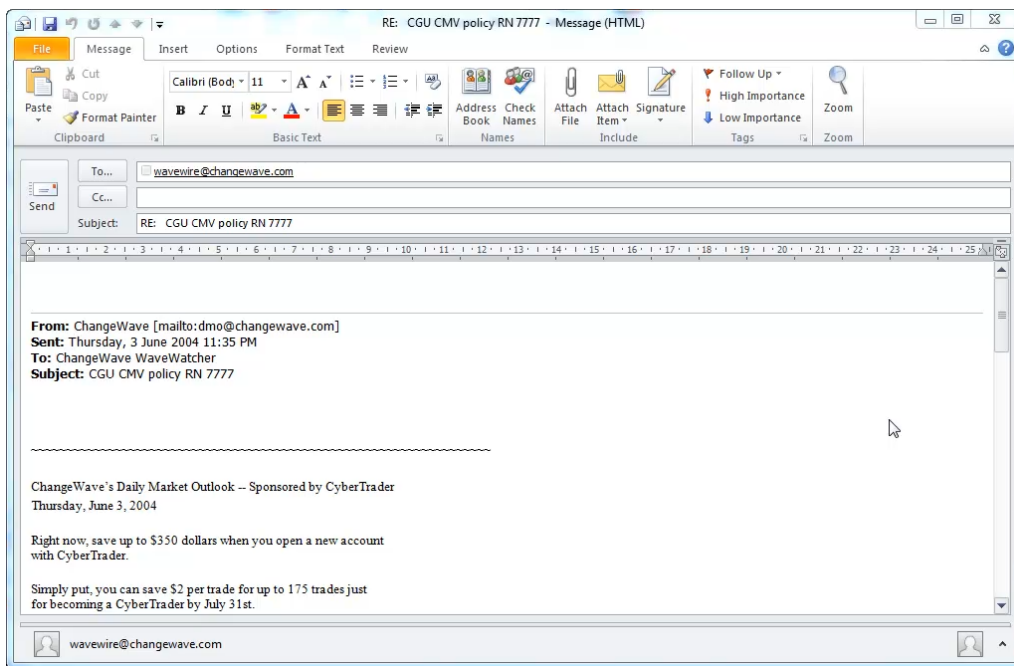
9 Repeat step 8 to check the other document back in also

COPYING DOCUMENTS INTO EMAIL

In previous versions of *organiseit*, to send documents from *organiseit* via email, you would have to place the document on the desktop and then move it into Microsoft Outlook or another email application. In the new version of *organiseit* you are able to copy documents straight into emails as attachments. By simply selecting a document in *organiseit* and using the shortcut menu, you are able to copy and paste that document directly into your email application to send it to other people.

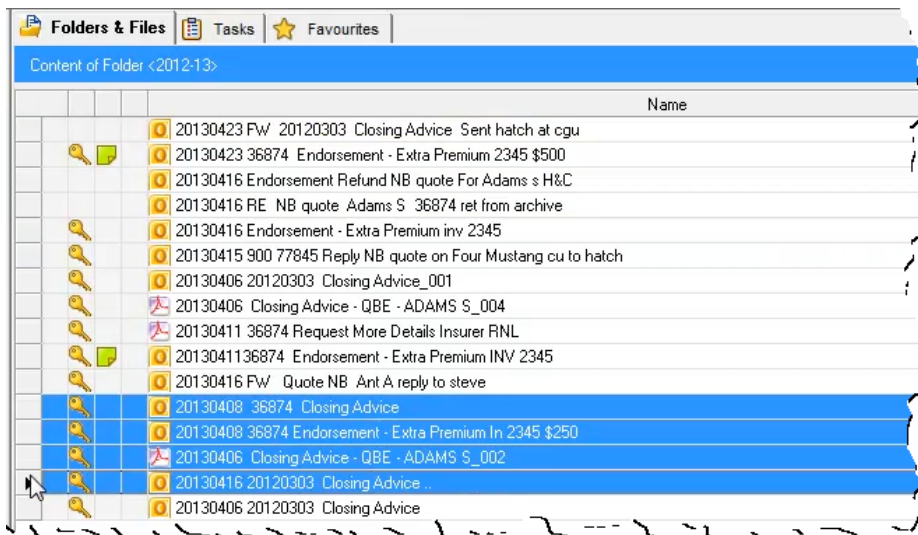
- 1 In your email application, open a new blank message or reply to one received

This will be the email that receives the documents...

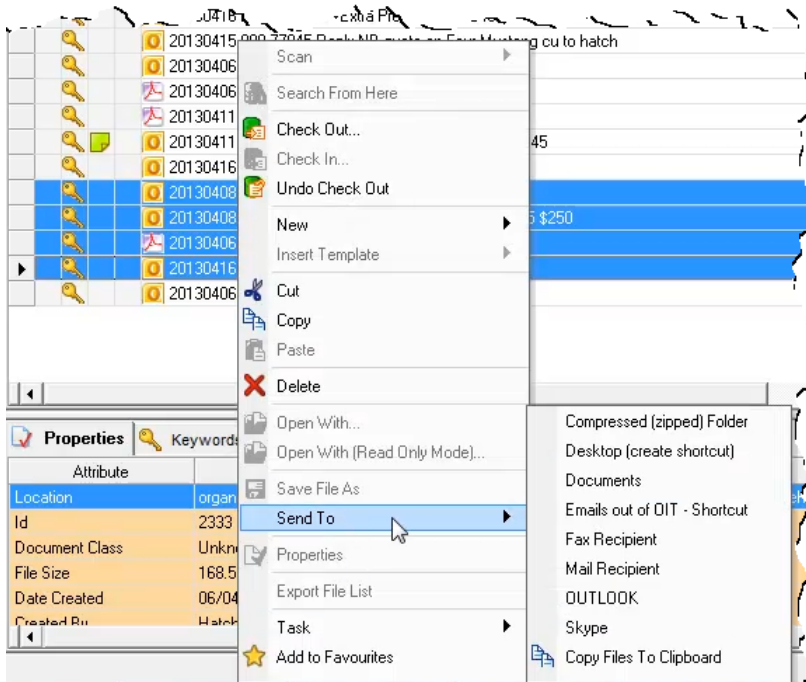


- 2 In the *organiseit* window, select multiple documents

You can do this by clicking and dragging the mouse over the small grey square at the very left of the documents that you want to select...



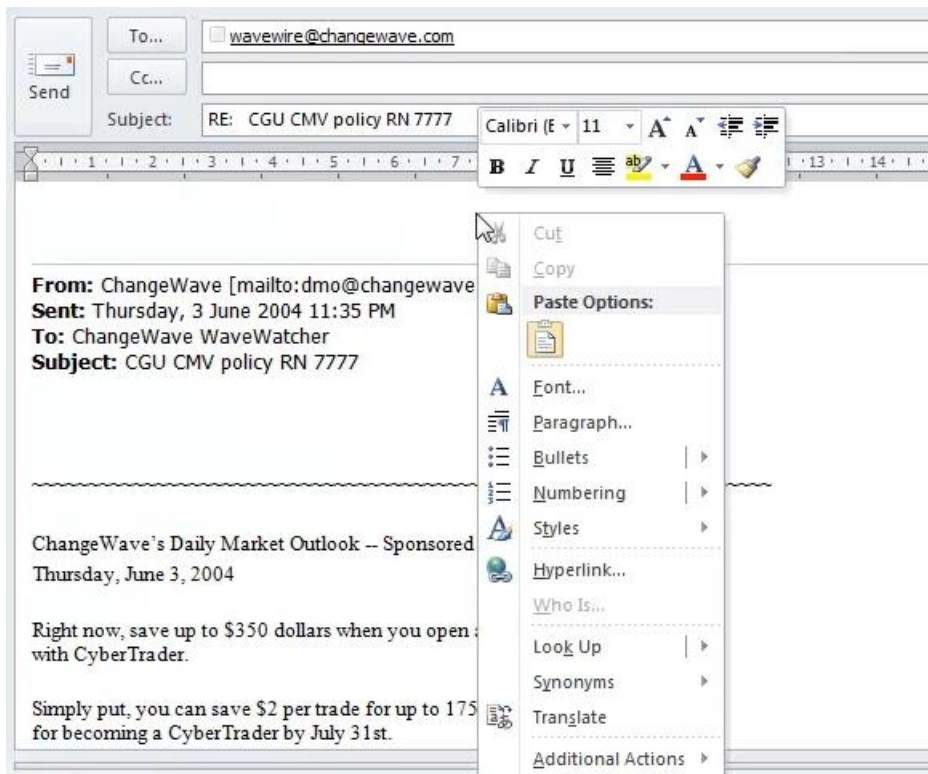
- 3 Right-click on any of the selected documents to display the shortcut menu, then select **Send To**




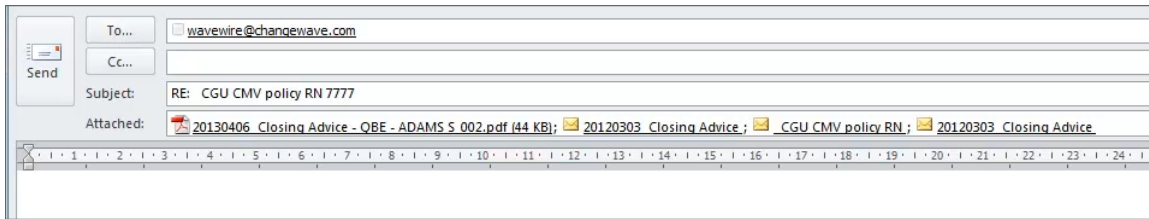
- 4 Select **Copy Files To Clipboard** to make a copy of the selected files

Nothing obvious happens, but the files have been copied to the computer's memory and we are now ready to paste the files into the email message...

- 5 Switch back to your email application and right-click in the body of the email to display the shortcut menu



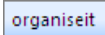
6 Click on **Paste**  in **Paste Options** to paste the copied documents as attachments



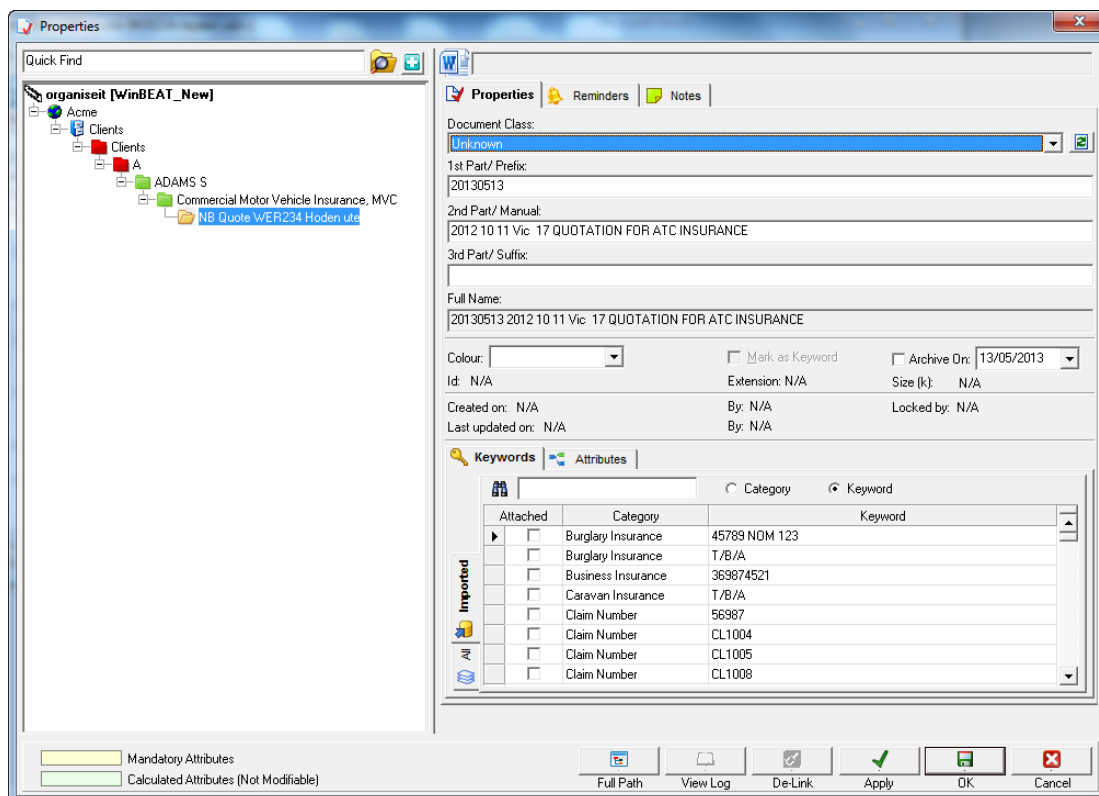
At this point you would send the email...

SAVING DOCUMENTS

When you bring a document into *organiseit* you might change your mind and choose to cancel the process. Another feature enhancement is that *organiseit* will now double-check that you really want to cancel the process and offer you the opportunity to either change your mind or save the document on your computer in your regular filing system (e.g. on another drive or on your desktop).

- 1 In Microsoft Outlook or another application, use the *organiseit* tool  to bring across a document to *organiseit*

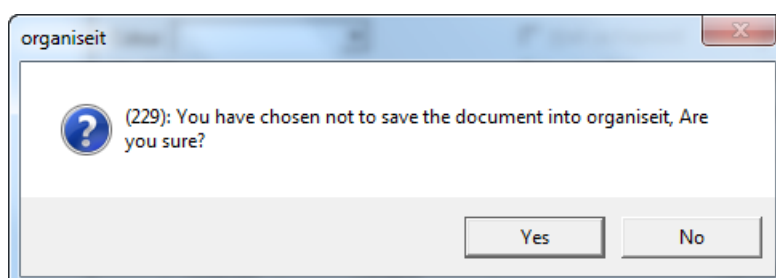
You should now see the Properties window...



*At this point, let's assume that we have decided to not bring this document across to *organiseit* and therefore will cancel the process...*

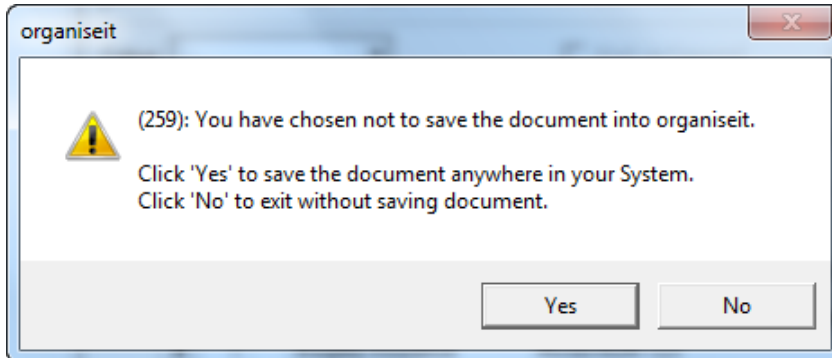
- 2 Click on [Cancel]  to display the message box

This message box is confirming that you want to cancel the process...

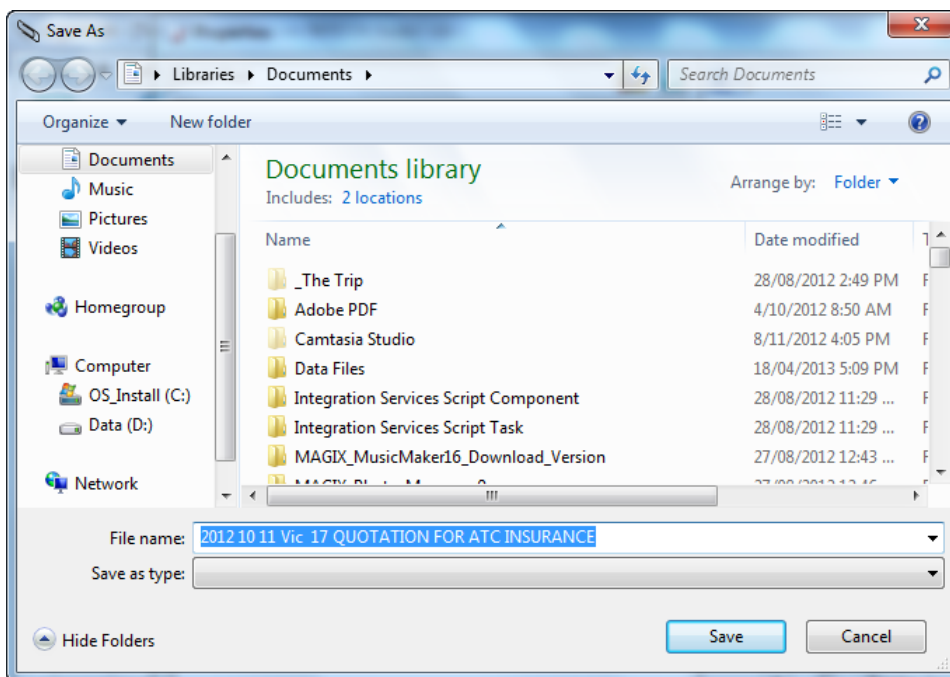


- 3 Click on [Yes]  to display the next message box


This message box enables you to save your document in your system, rather than organiseit...



- 4 Click on [Yes]  to display the **Save As** dialog box



Now you are able to navigate to the location on your computer (or network drive) where you want to save the document. In this instance, we will cancel out without saving...

- 5 Click on [Cancel]  to close the **Save As** dialog box without saving