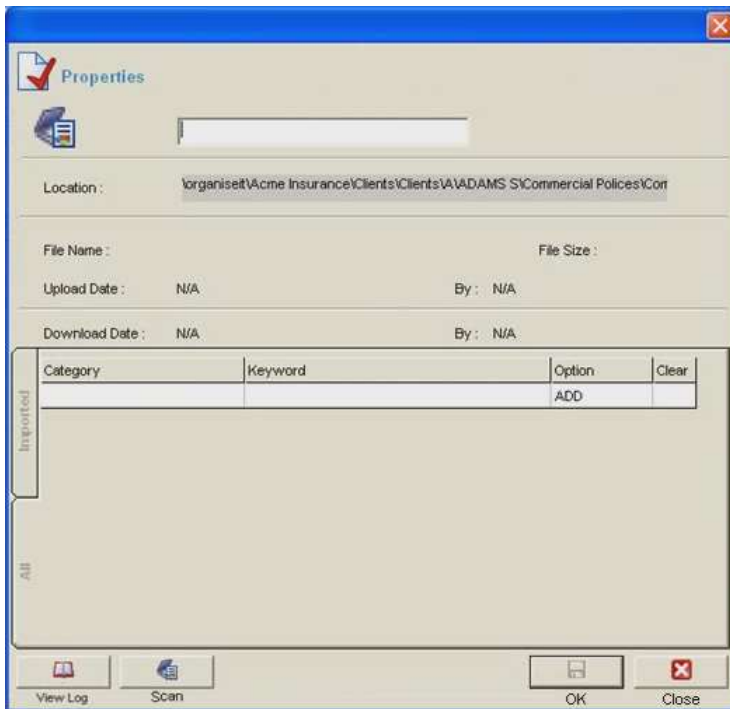
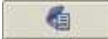
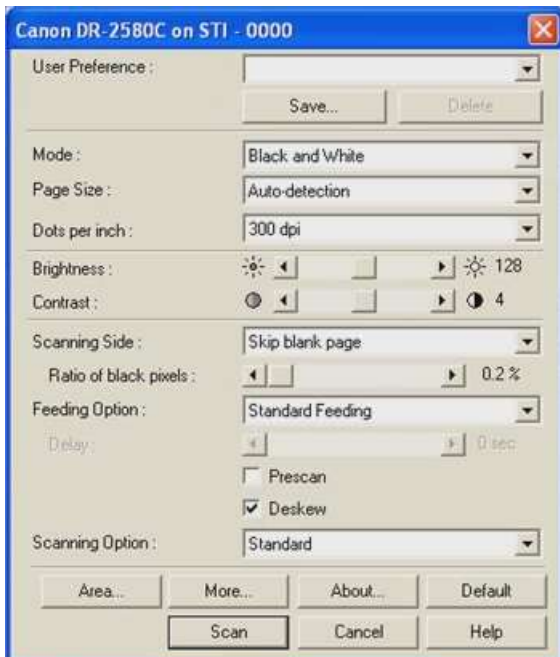


1 Acquire to display the *Properties* window




2 Click on *Scan*  to display the scanner interface

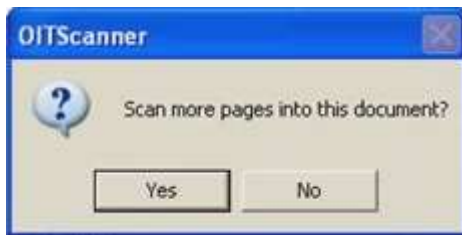
*Remember that you're screen will probably look different to the one shown here, as each scanner has a different interface...*



3 Set the options as required

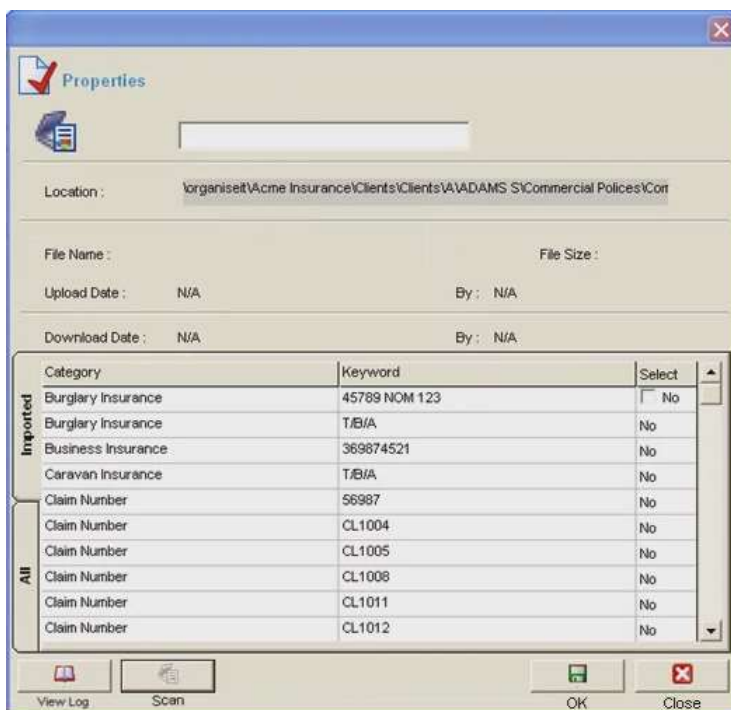
4 Click on *Scan*  (or the related tool for your scanner) to scan the information in the scanner

When the scanner has completed that page, a message box will ask you if you have any more pages that you would like to scan...



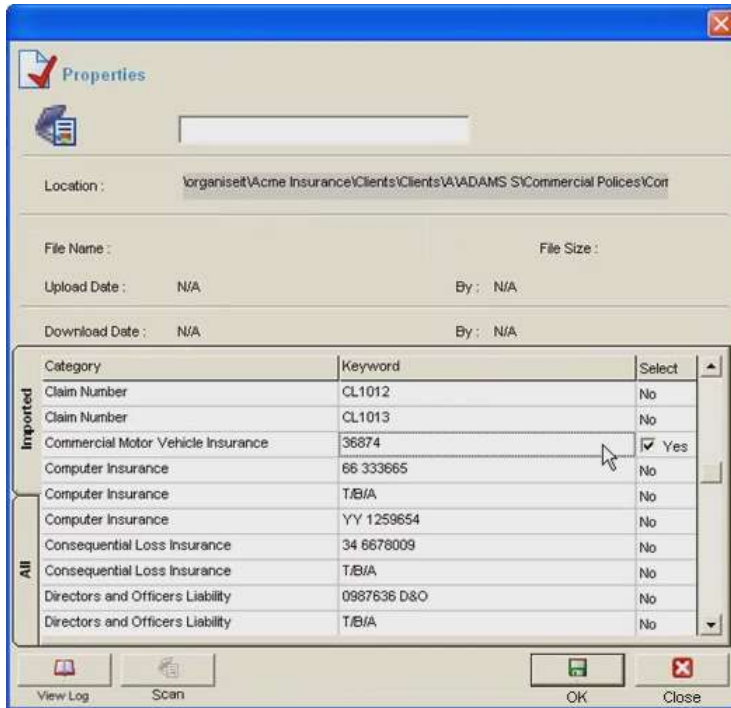
- 5 Click on **Yes**  to scan another page, or click on **No**  to complete the action and return to the **Properties** window

If you have Winbeat, BA, Broker Plus or a database with pull, the **Properties** window will automatically populate with the keyword information of policies and claims for that client when the scan is complete. You might need to scroll down to locate the specific file...

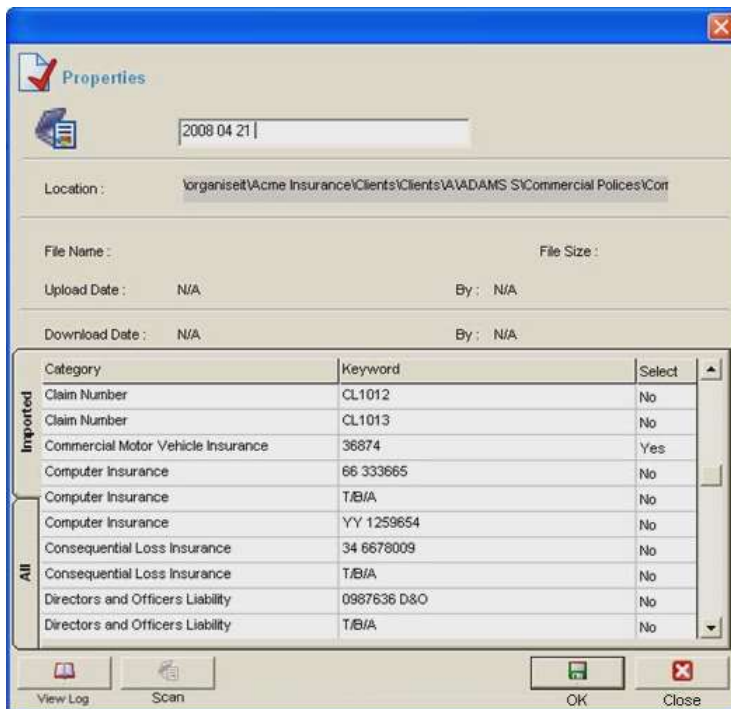


The new scanned file should now be named...

- 6 Locate the file that you have just scanned, then click in the **Select** column to display the tick box and click on the tick box to change it to **Yes**



7 Click in the blank field at the top of the window and type in a file name for the document



8 Click on **OK**  to complete the process

## Document Naming in Word

In the previous version of organise*it* the number assigned to a document, automatically generated by organise*it*, was displayed in the Microsoft Word title bar, when you were viewing the document.

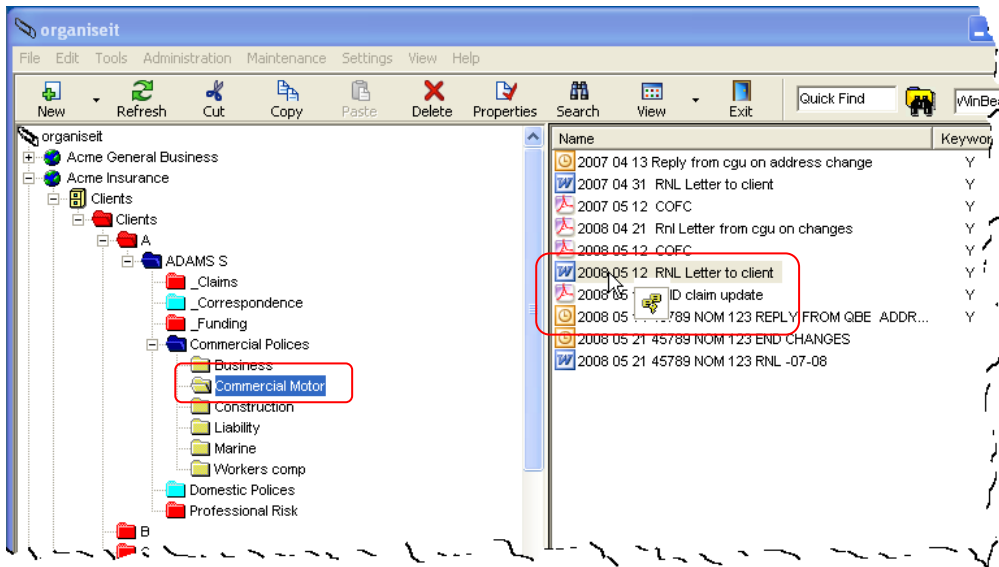
This then was also the name displayed in the Task Bar at the bottom of the screen. Given that more than one document might be open at any one time, it was difficult to remember which document was which, based on a number.

In the new version of organise*it*, the real name of the file is now displayed.

## DOCUMENT NAMING IN WORD

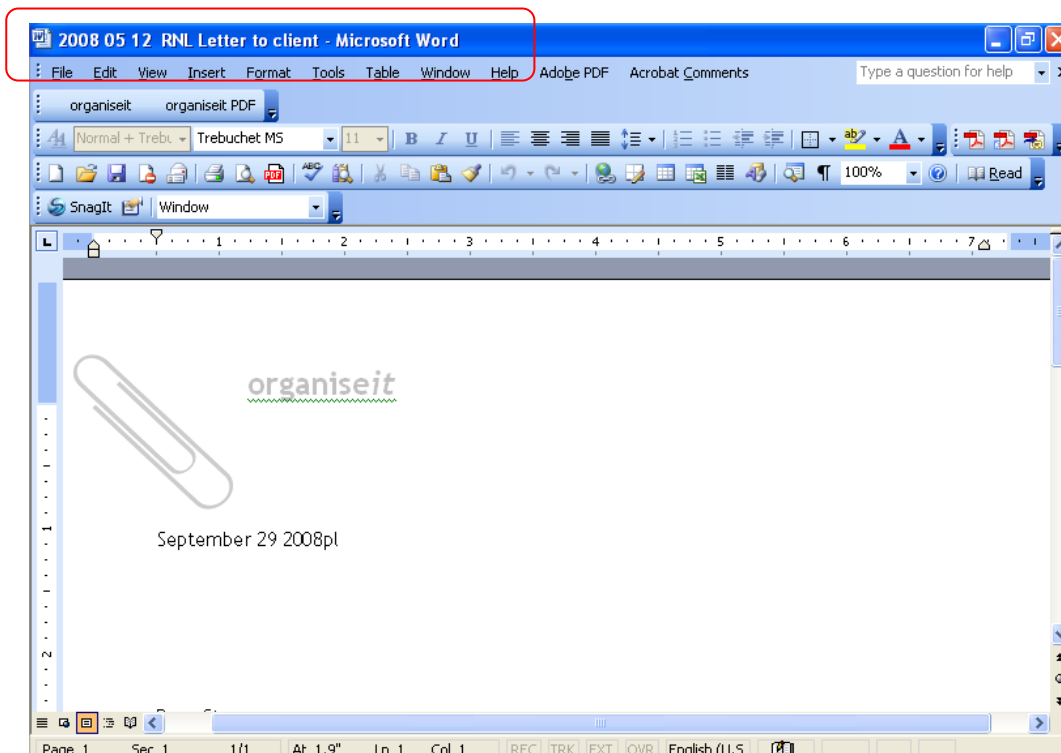
In this exercise, we will see how the name displayed in the Microsoft Word title bar has changed, when you are viewing a Word document stored in *organiseit*.

- 1 In the *organiseit* database window, click on the plus  $\oplus$  icons to locate the folder that contains the Word document that you want to view



- 2 Double-click on the Word file, in the right pane, to open it in Microsoft Word

*Notice that the full file name of the document is displayed in the title bar, making the document easier to identify...*



## Sending Documents to organise*it*

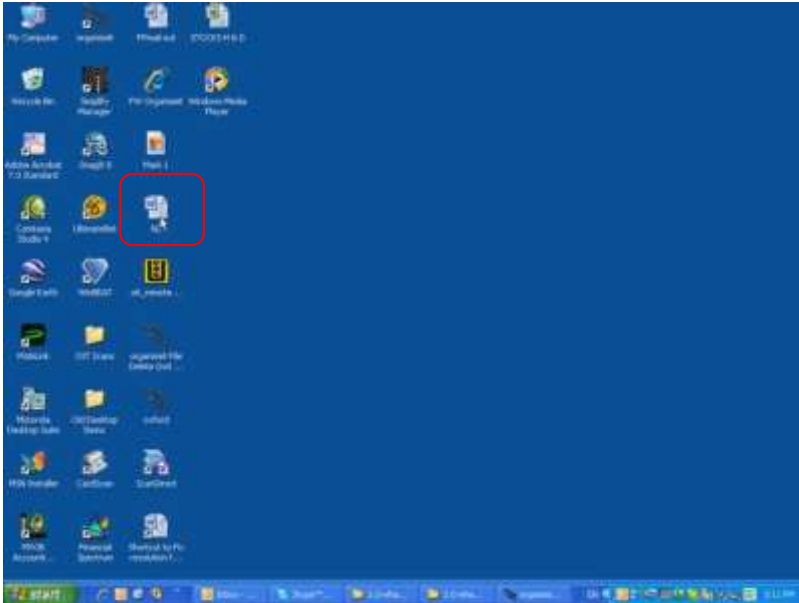
An integral part of the organise*it* installation is the capacity to automatically send documents to the application. For instance, if you have a document stored on the desktop, you can instantly send it to organise*it*. This is achieved through the shortcut menu, displayed when you right-click on the document. A special option has been included on the menu, as you will see.

## SENDING DOCUMENTS DIRECTLY TO organiseit

In this exercise, we will send a Word document, stored on the desktop, directly to organiseit. You will see that as a part of the process, you are able to select a specific folder into which to save the file.

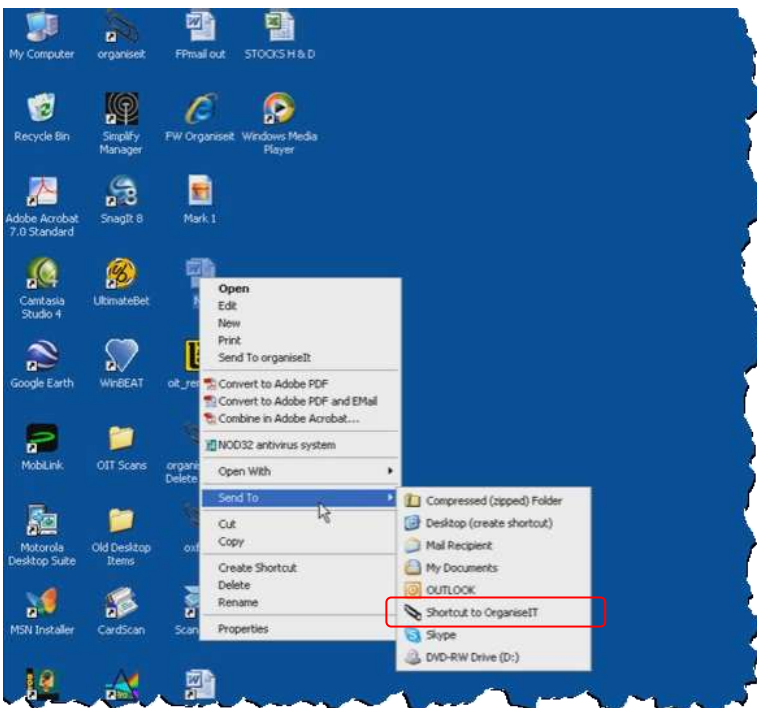
- 1 Locate the document that you want to send to organiseit

*In our example, this file is stored on the desktop...*



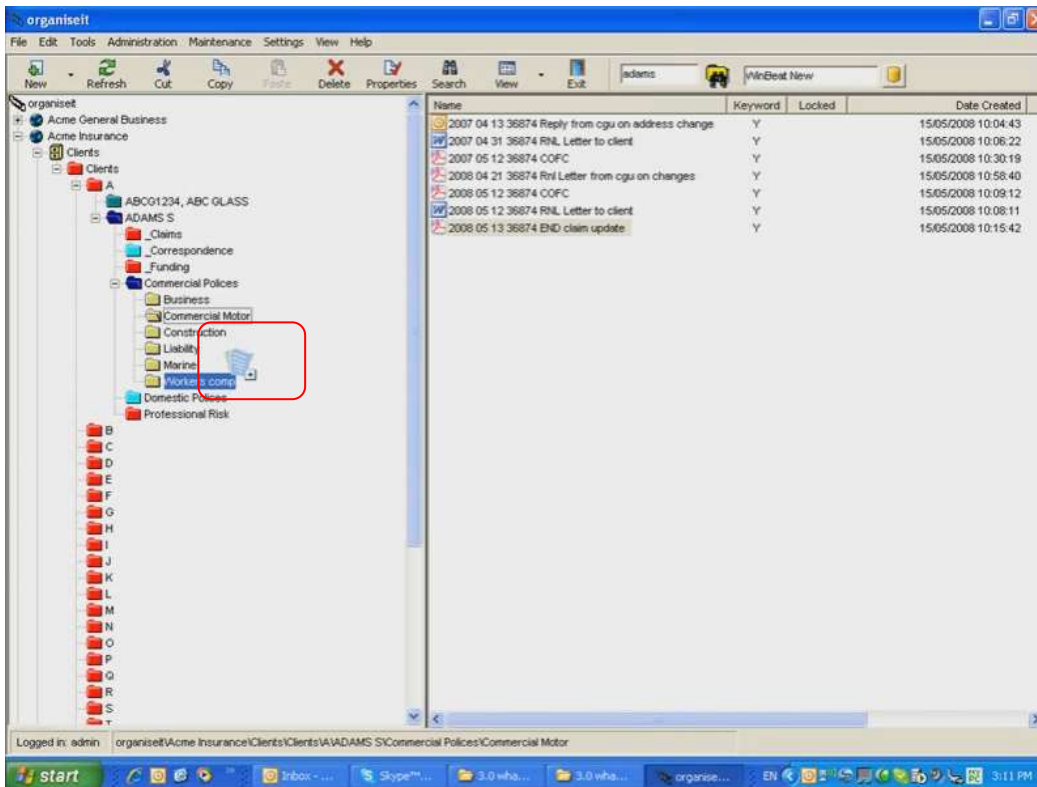
- 2 Right-click on the file to display the shortcut menu, then select **Send To** to display the submenu

*Here you will see a customised option, added when organiseit was installed...*

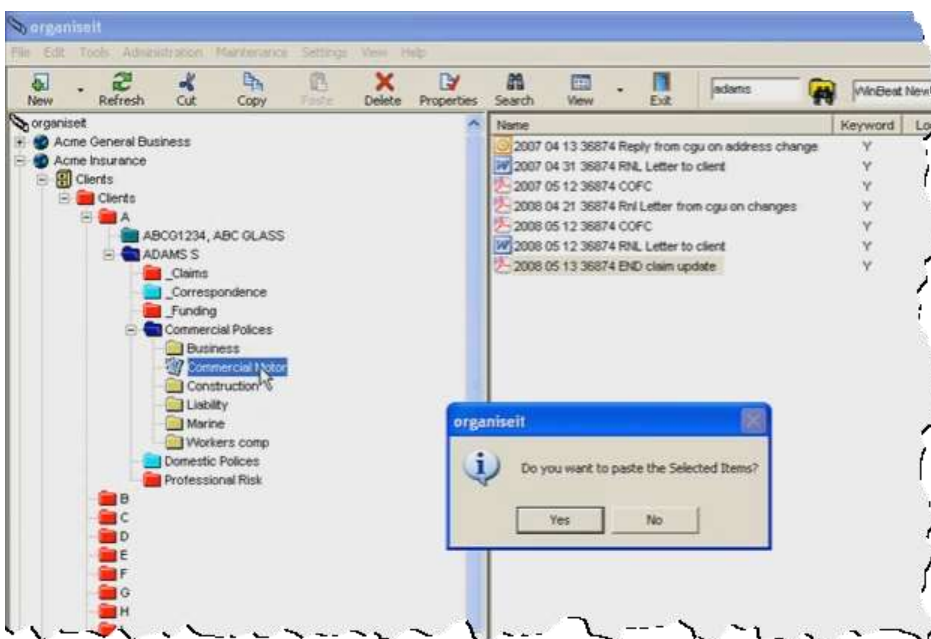


3 Click on **Shortcut to OrganiseIT**

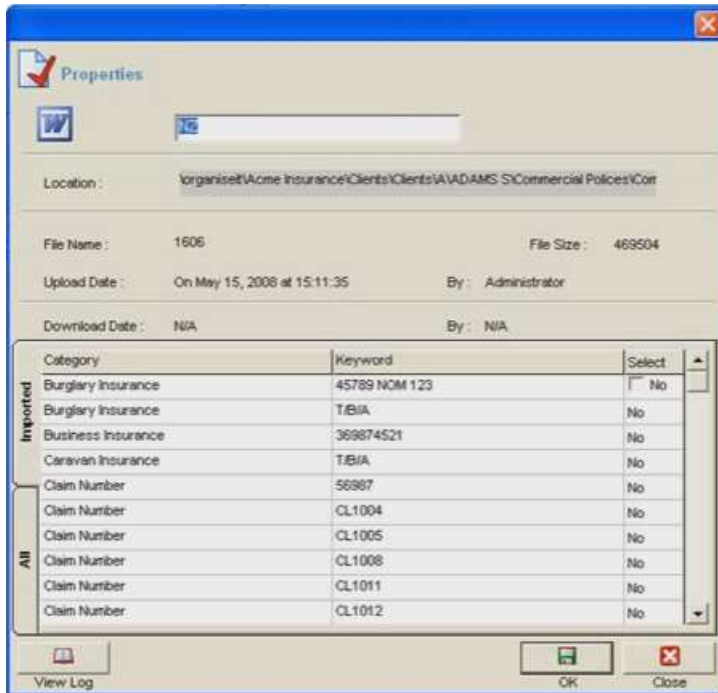
This will open the organiseit database window and you will notice that an icon of the document is attached to the mouse pointer...




4 Move the mouse pointer over the folder into which you want to save the file, then release the mouse  
organiseit will now confirm the **Send To** action...



5 Click on **Yes**  to display the **Properties** window



*You just need to consider the name of the file...*

- 6 Type a name in the field at the top of the window, if you want to change it
- 7 Click on **OK**  to complete the process

## Checking Out Documents

Using the organise*IT* database, you can open and work with Microsoft Word or Excel documents for instance and then, when you have made the necessary changes, you close the document and save the changes back to the database.

What tends to happen in practice is that a file may be opened to be worked on, and be kept open all day. In itself this is not a problem, but if the server connection to the database is lost throughout the day, for instance, all the changes that you have made will also be lost.

To address this issue, you are now able to check a document out of and in to the database. This involves checking a selected document out of the database, into a selected folder. The Microsoft Autosave feature works automatically to save the changes to any checked out document, ensuring that all changes are saved, even if the database collapses during this period. Once you have finished making you changes, you simply check the document back in to the database and the process is complete.

## CHECKING OUT DOCUMENTS

In this exercise, we will check out a Word document and store it in a nominated folder on the desktop. Once some changes have been made to the document, it will then be checked back in to the *organiseit* database. You will see that as a part of the process, you are required to select a specific folder into which to save the file, while it is checked out; this is where the file resides while you are working on it. This requires you to have a folder created prior to this exercise.

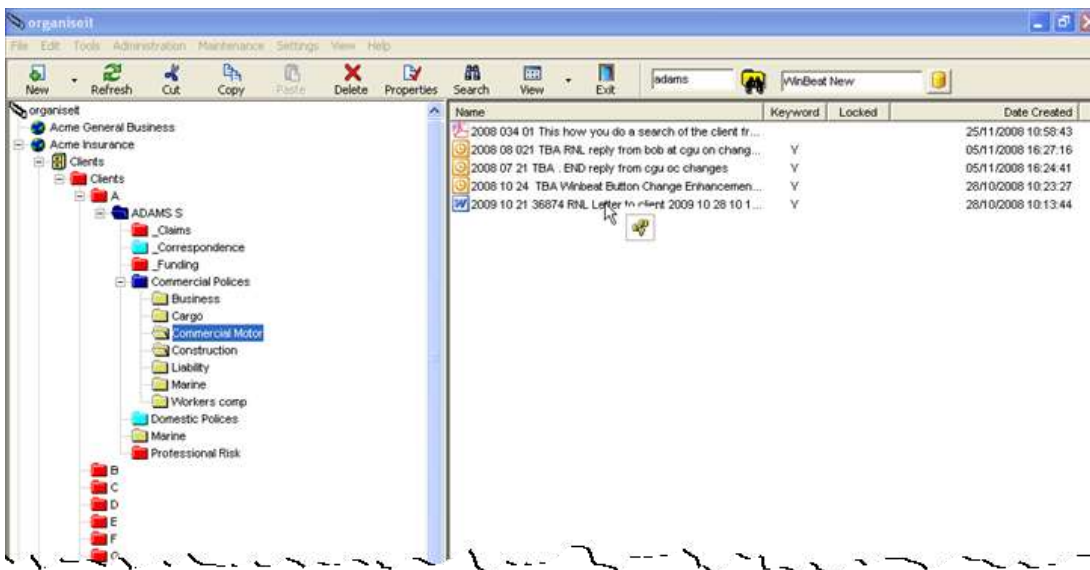
- 1 Ensure that you have a folder created, into which the documents can be checked out

*In this example, we have created a folder called **\_Checkout folder** and placed it on the Desktop for ease of access...*

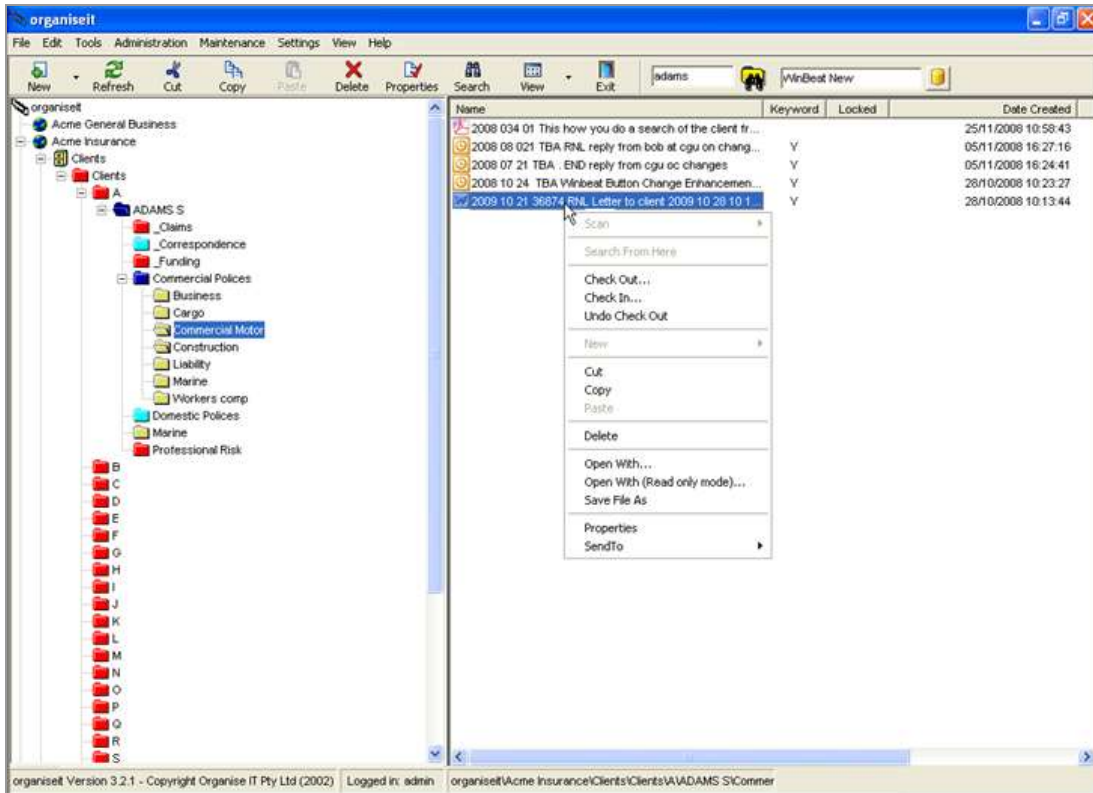


- 2 Open the *organiseit* database and locate the document that you want to check out

*In our example, the MS Word file that we require is stored in a client folder...*



- 3 Right-click on the document to display the shortcut menu



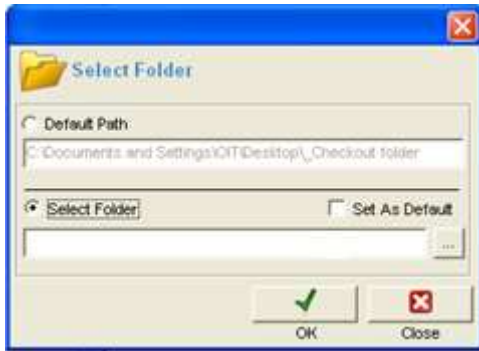
4 Click on **Check Out** to display the **Select Folder** dialog box




*If this is the first time that you have used the check out feature, you will need to nominate the folder to which the document will be checked out. You can alternatively nominate a default folder location that organiseit will automatically use each time. In this example, a default folder has already been selected, so let's look at how you can set this up...*

5 Click on **Select Folder** until it appears selected

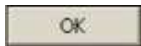
*The associated options become active also ...*



- 6 Click on the **Browse**  button to display the **Browse for Folder** window



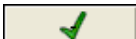
- 7 Locate and click on the folder to which the document will be checked out to, then click on **OK**



*The folder now appears as the **Selected Folder**...*

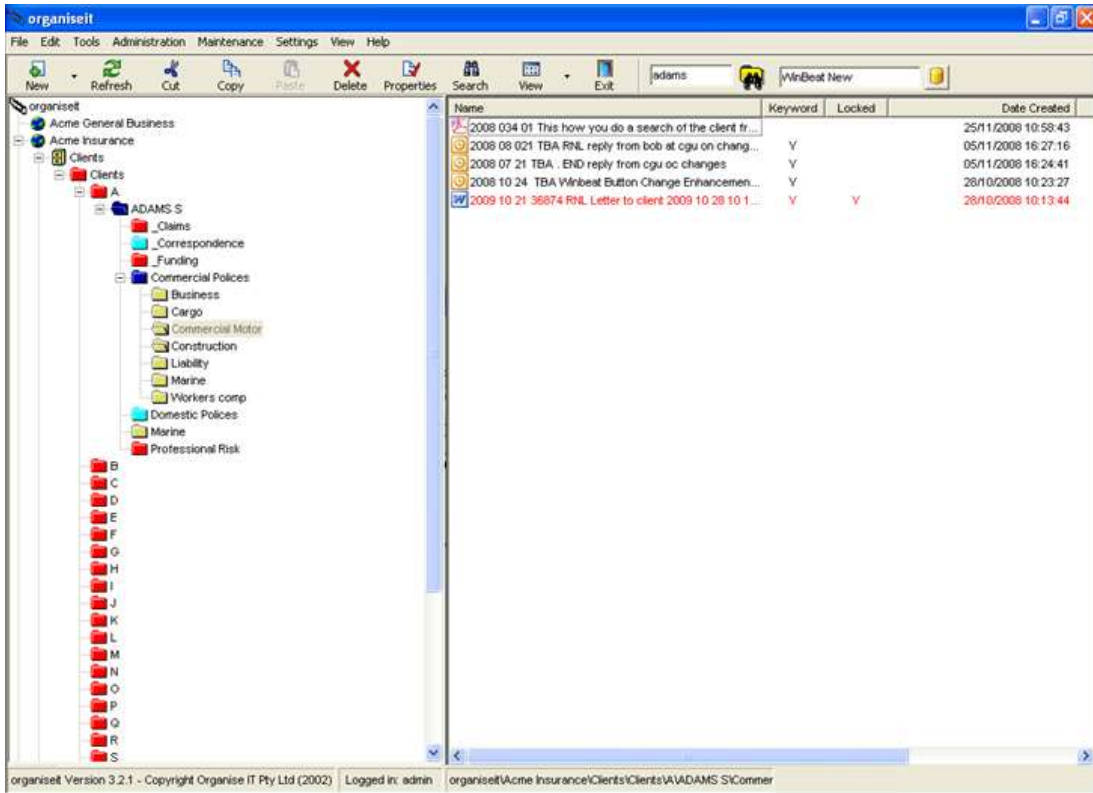
- 8 Click on **Set As Default** to select it as the default folder, if necessary



- 9 Click on **OK**  to return to the organiseit window

*Notice that the checked out document now appears red and Locked, indicating its “checked out” status...*

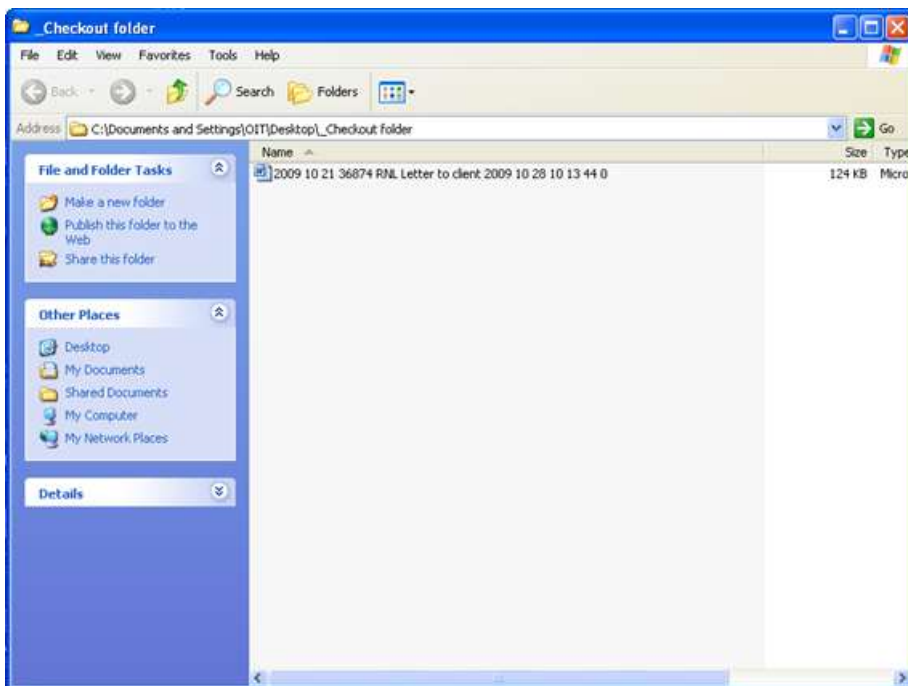
organiseit - v3.2.1 USER GUIDE - UPGRADE  
Checking Out MS Word Documents



Let's now open the document, make some changes and then check it back in to the database...

- 10 Locate and open the folder to which the document was checked out

In this instance, it was the **\_Checkout folder on the Desktop**. Notice the checked out document in the folder...




- 11 Double-click on the document to open it

As the document in this example is a MS Word document, Microsoft Word will open and display the document...

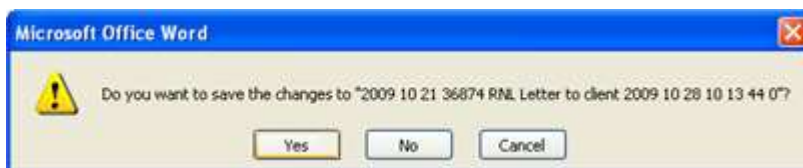


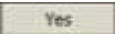
12 Make the changes as required

*Microsoft's Autosave feature will automatically save the document for you (assuming that you have the feature activated, of course), so even if you have the document open all day, you are assured that your changes will be saved...*

13 Click on **Close**  for the Microsoft Word application window to close the document and the application

*You will be asked to save any final changes...*

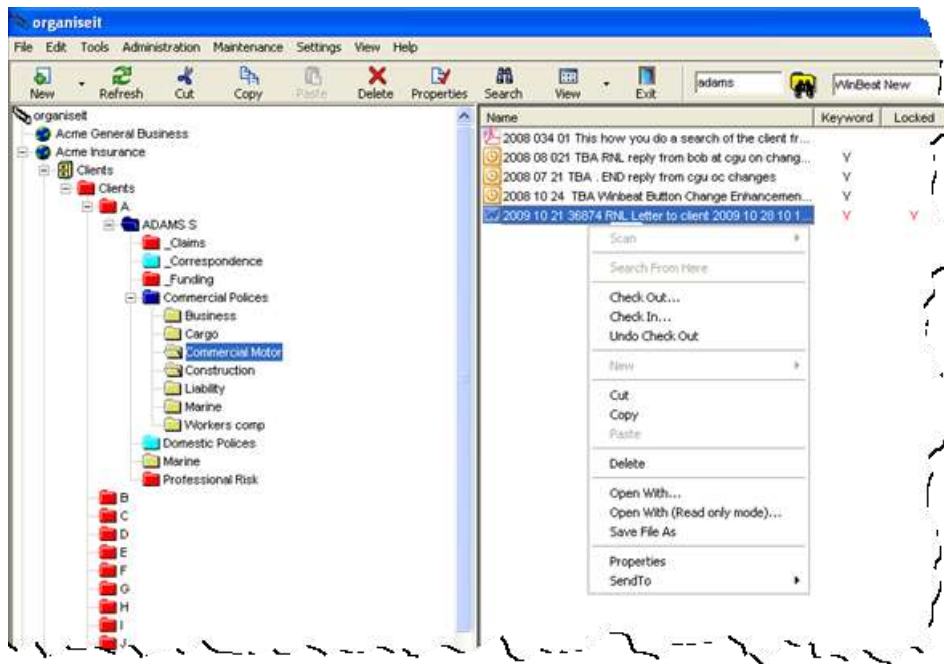


14 Click on **Yes**  to save the changes and return to the folder window

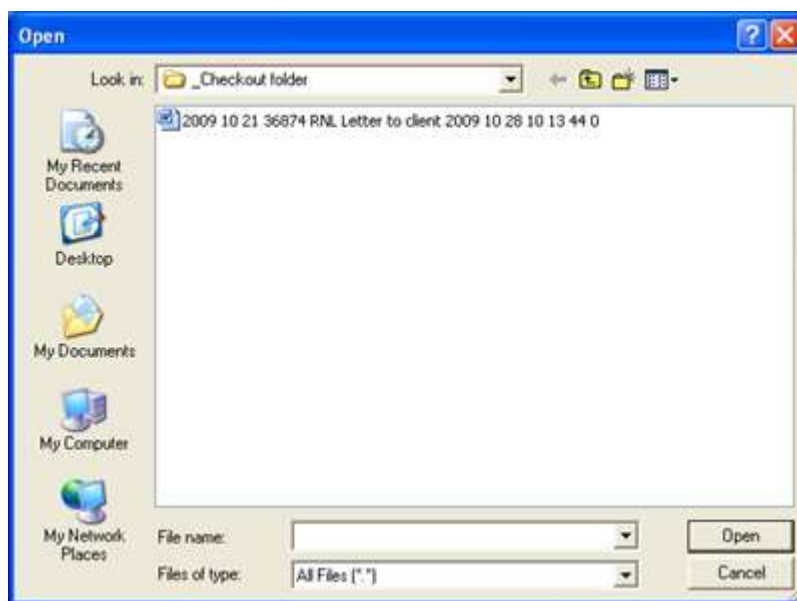
*You now need to check the document back in to the database...*

15 Return to the organiseit database window

16 Right-click on the red, checked out document to display the shortcut menu



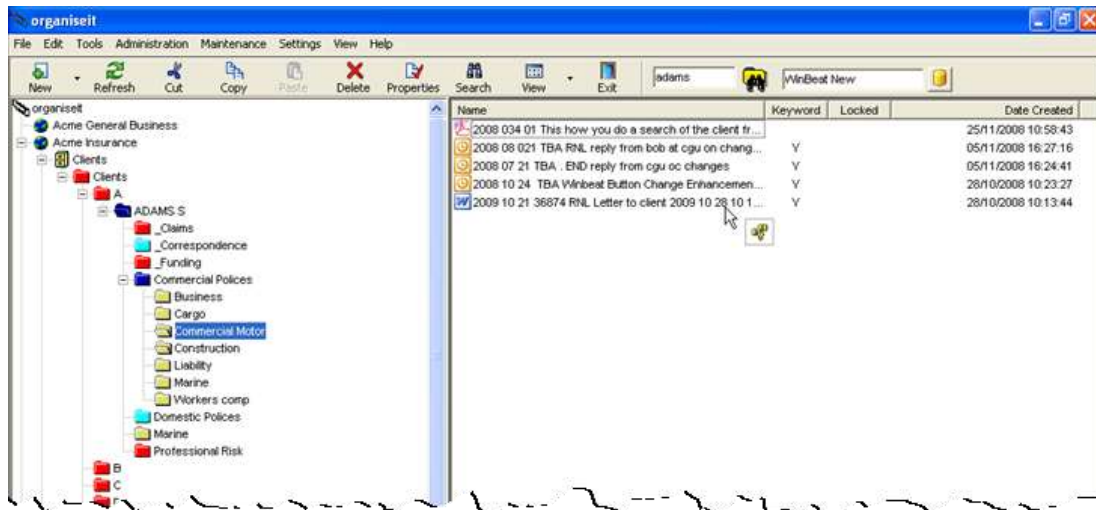
17 Click on **Check In** to display the *Open* dialog box



18 Click on the file that you want to check back in to the database

19 Click on **Open**

*The document will no longer be displayed in red and will once again be unlocked, indicating that the updated document is now ready for use...*



## Grid View

Traditionally, the organise*it* database window is displayed in **Tree View**. In this view, you have the database folders displayed in a tree-like, hierarchical structure in the left pane and the contents of the selected folder are displayed in the right pane. The folders in the left pane are displayed in an alphabetical order. The issue that arises from this view is that it can become quite cluttered once you have a large number of clients, each with a large number of folders, making information difficult to find.

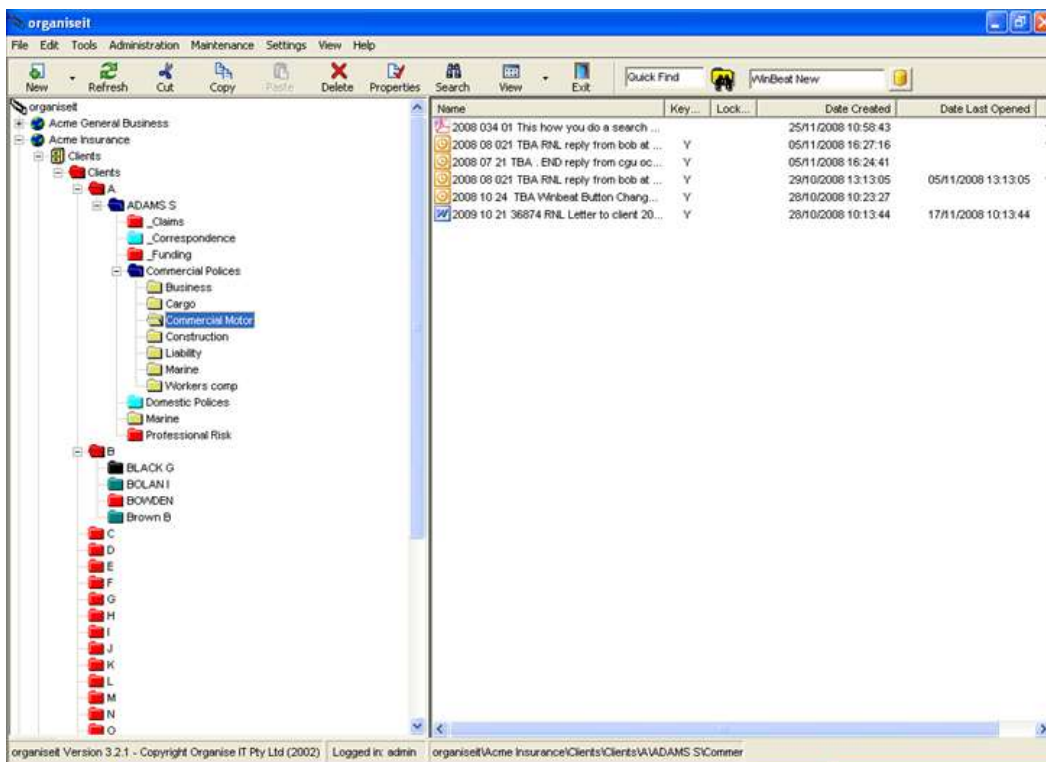
The new version of organise*it* enables you to view your folders in **Grid View** - a less complicated view of your database content. In this view, you only see the contents of one client or folder at a time, giving a less cluttered appearance to the screen.

## USING GRID VIEW

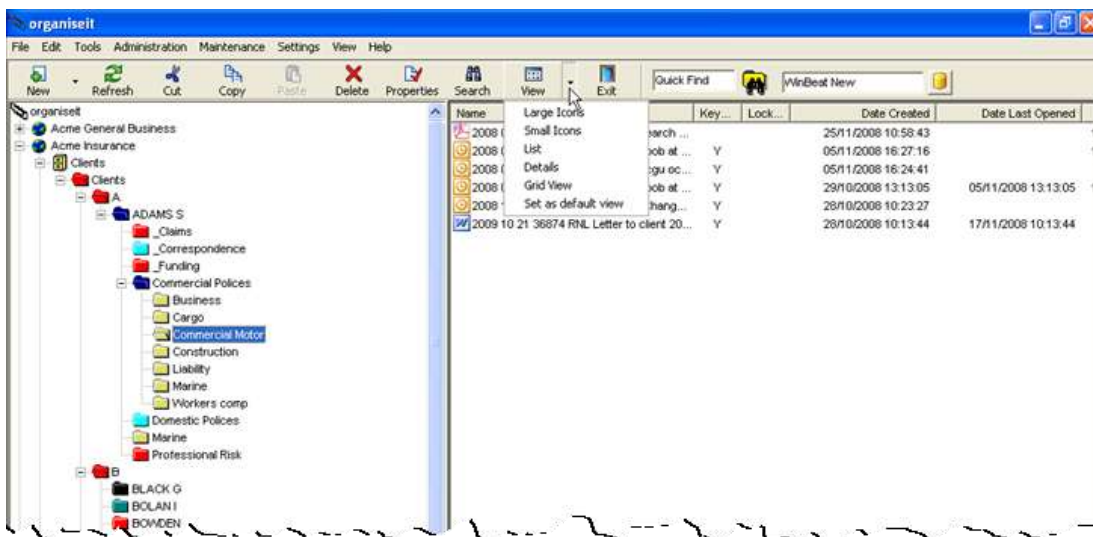
In this exercise, we will use the Grid View and demonstrate how the functionality is primarily the same as that for Tree View.

- 1 Ensure that the *organiseit* database is open

*By default, the database contents are displayed in Tree View - the filing objects are displayed alphabetically in the left pane and the contents of the selected object are displayed in the right pane...*

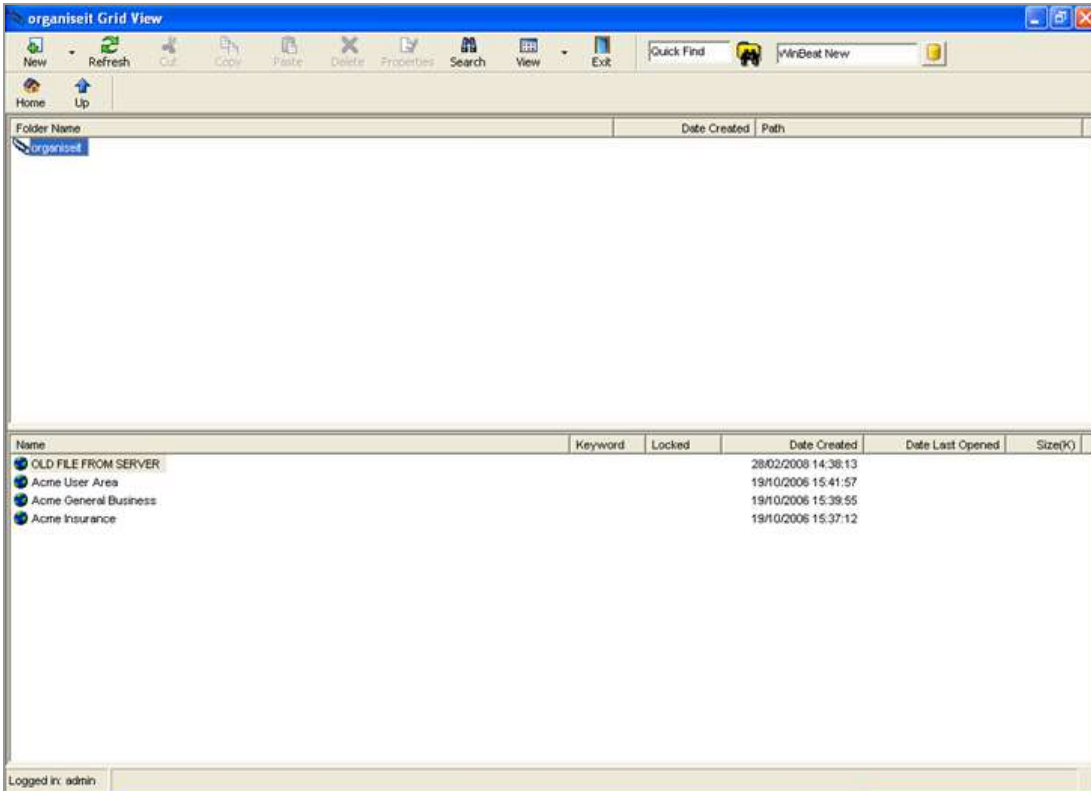


- 2 Click on the drop arrow for the **View** tool  to display the menu



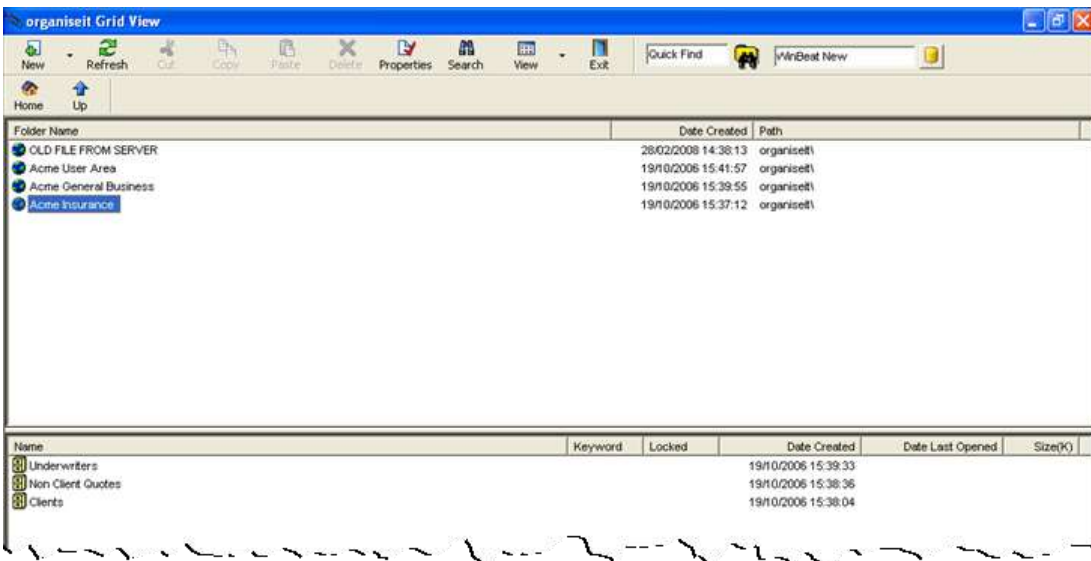
3 Click on **Grid View**

When you change to this view, the top level folder (the database) icon is displayed in the top pane. The contents of this folder are displayed in the bottom pane...




4 Click on an item in the bottom pane to open it and display its contents

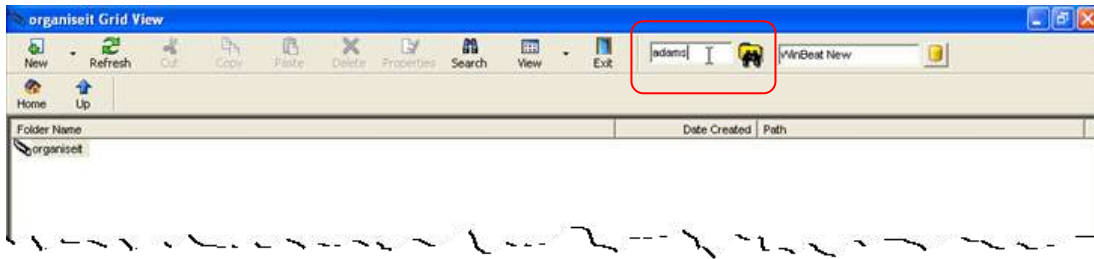
That item is now displayed in the top pane and its contents are displayed in the bottom pane...




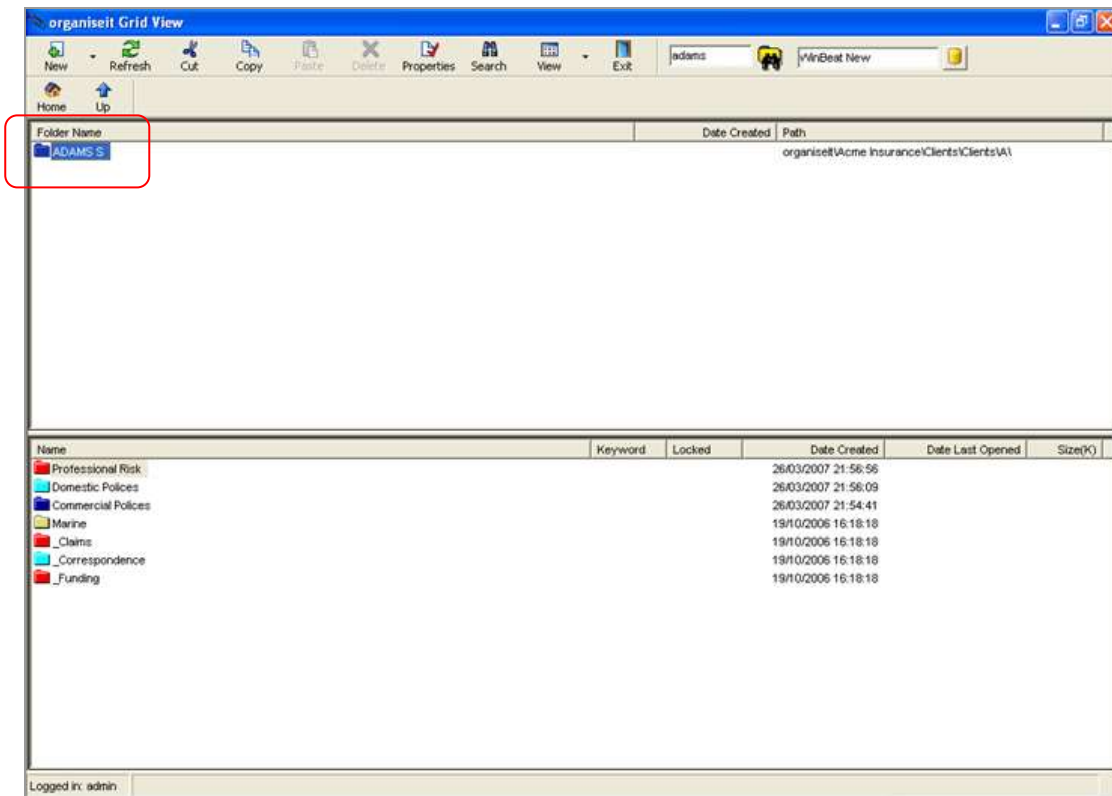
The easiest way to now locate a particular client is to use the Search tool...

5 Click on **Home**  to return to the top level folder

6 Click in the **Search** field and type the name of the client that you want to view

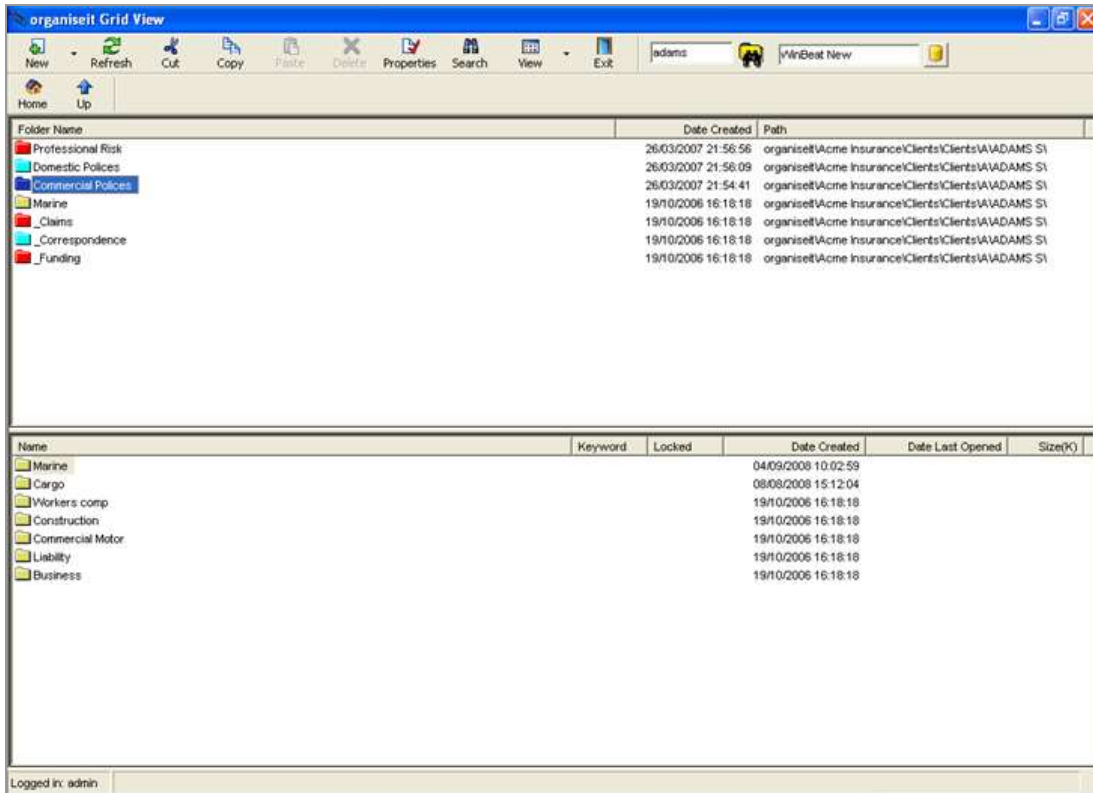


7 Click on the **Search** tool  to locate the nominated folder and display the contents

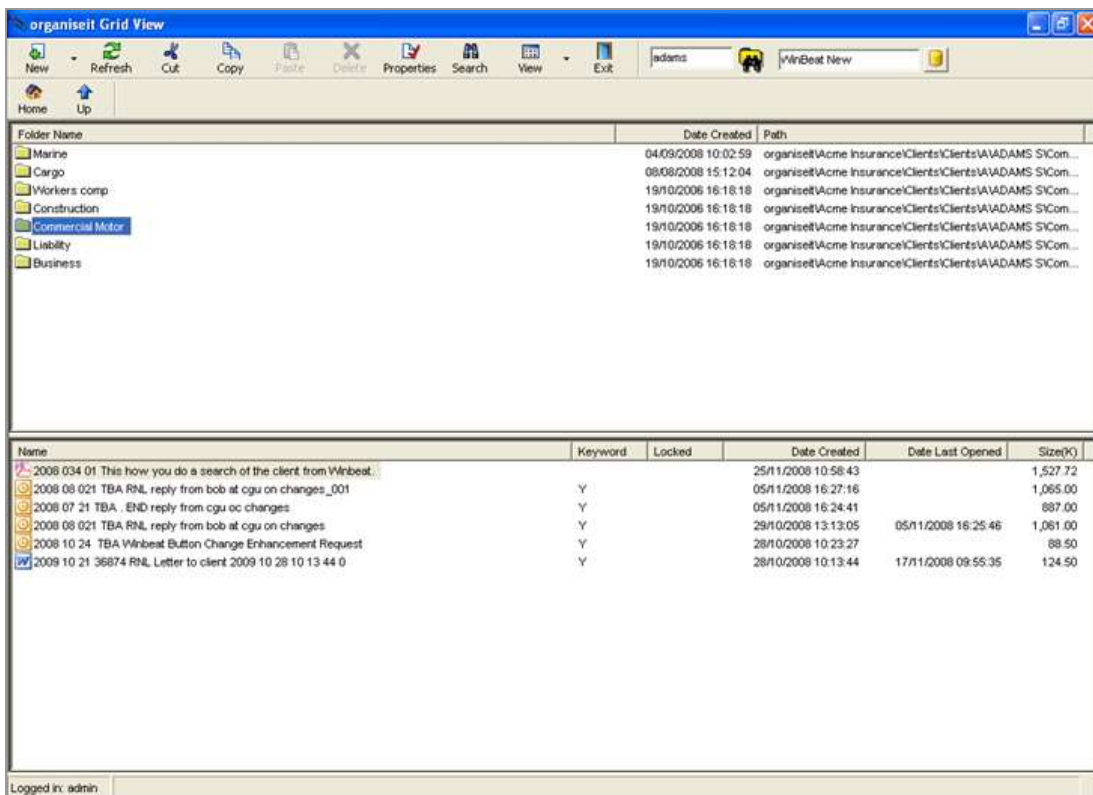


8 Click on a folder in the bottom pane to display the contents

Grid View



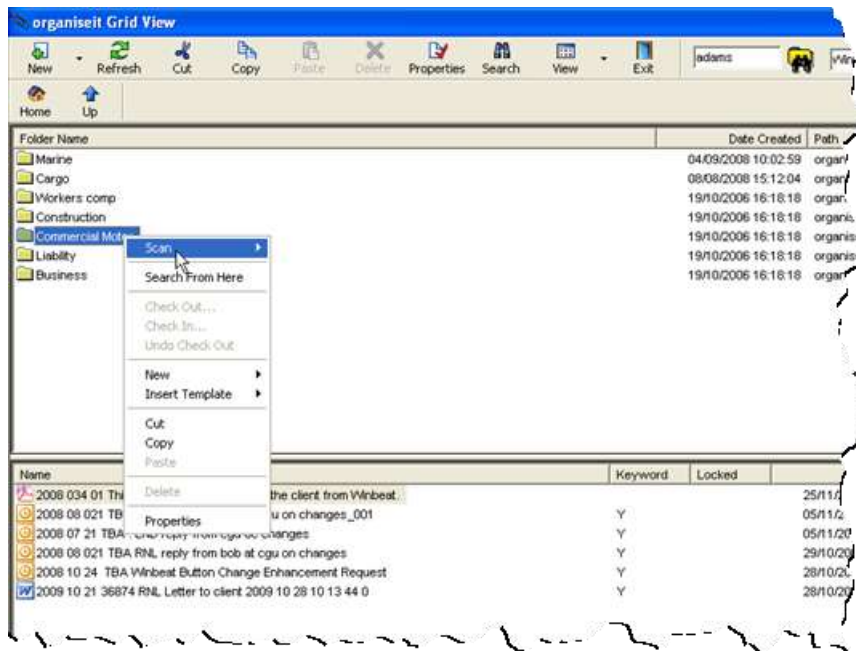
9 Continue to click on the folders in the bottom pane, to drill down and see the documents



You are still able to perform the same functions in Grid View as you can in Tree View...

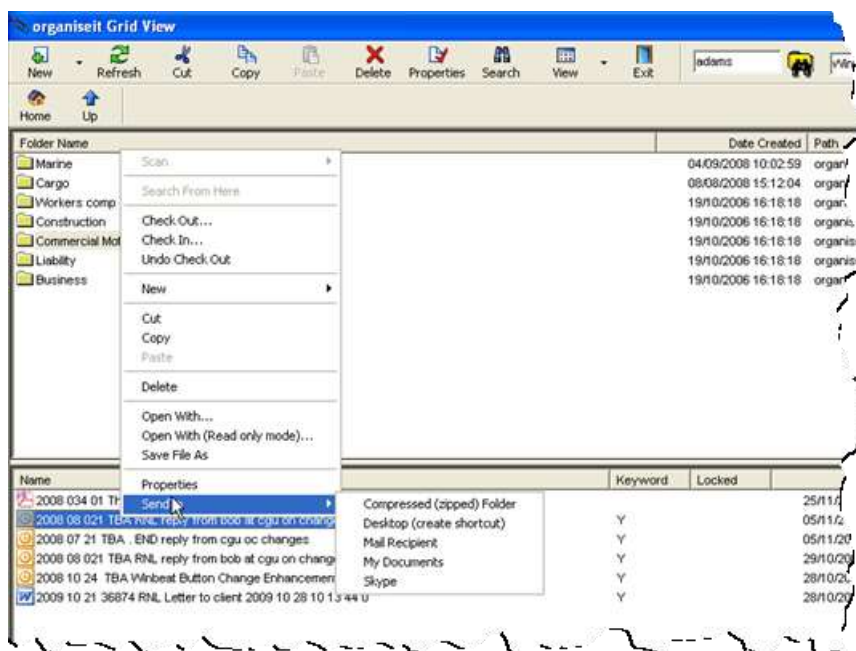
10 Right-click on a folder in the top pane to display the shortcut menu

The menu enables you to Scan the document as before...



- 11 Right-click on a document in the bottom pane to display the shortcut menu

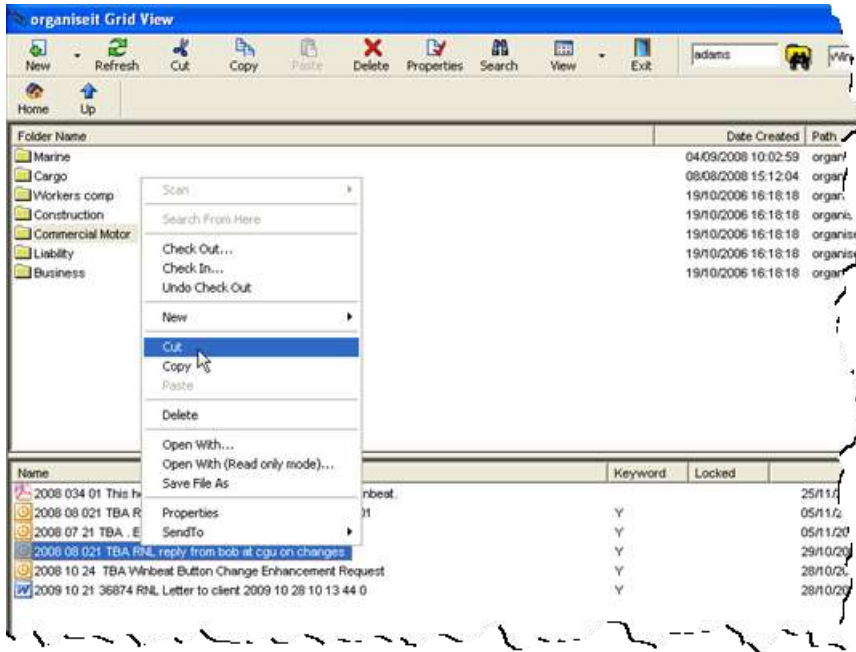
This menu enables you to Cut and Copy, or email the document using Send To...



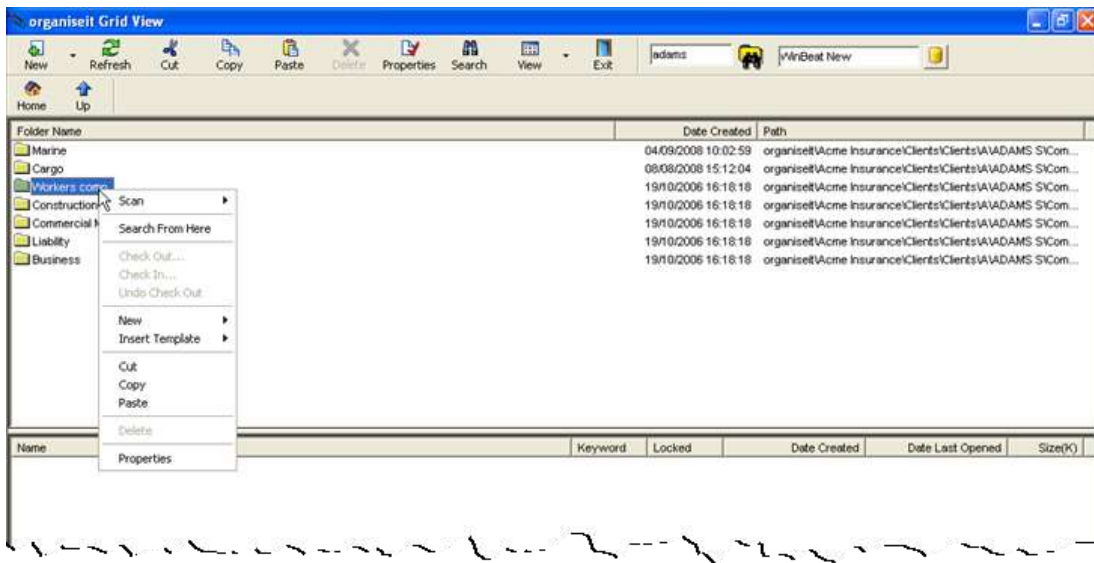
NOTE: One thing that you are not able to do in Grid View is drag and drop a file from one folder to another - you must use the Cut and Paste options to move a document in this view...

- 12 Locate the document that you want to move in the bottom pane
- 13 Right-click on the document to display the shortcut menu and click on Cut

Grid View

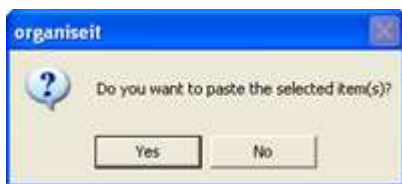


14 Right-click on the folder into which you want to move the document to display the shortcut menu



15 Click on Paste

*organiseit will ask you to confirm your action...*



16 Click on Yes  to continue

*The document has now been moved...*

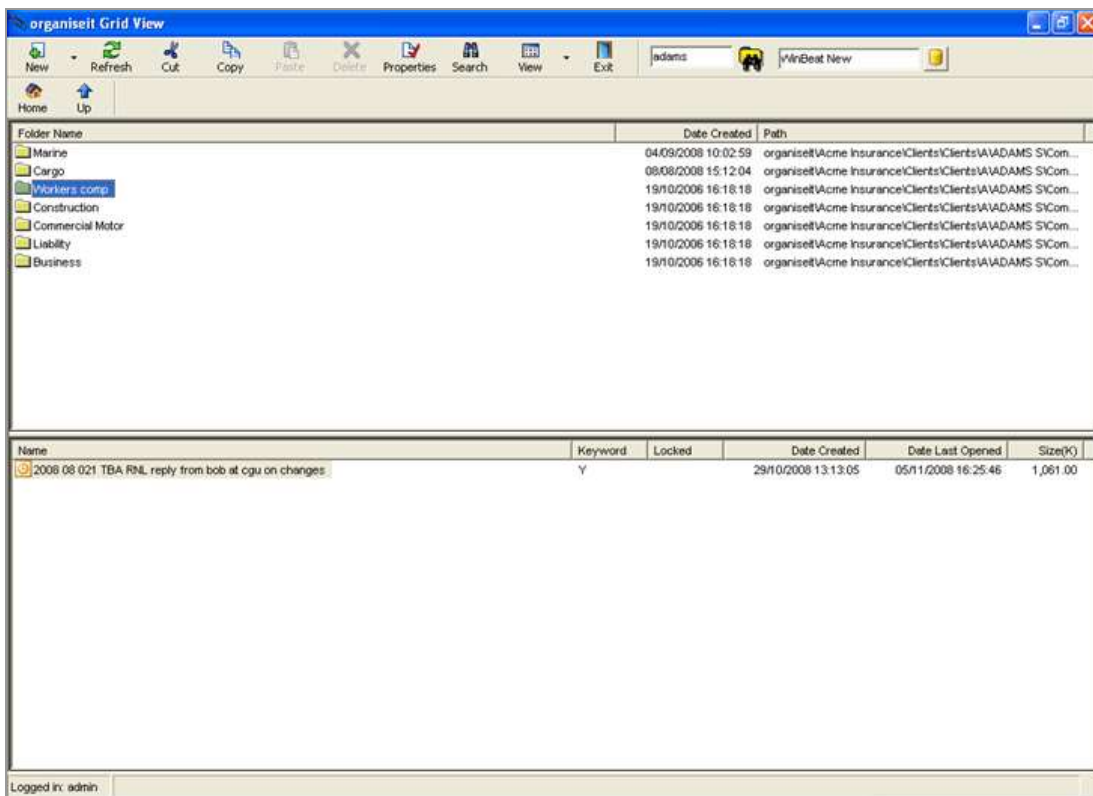



You can locate and open the destination folder to check this, if necessary...

17 Click on **OK** 

18 Locate and click on the folder to display the contents

Here you will now see the copied document...



19 To switch back to **Tree View**, click on the drop arrow for the **View** tool  and click on **Tree View**

## Handling MS Word Documents

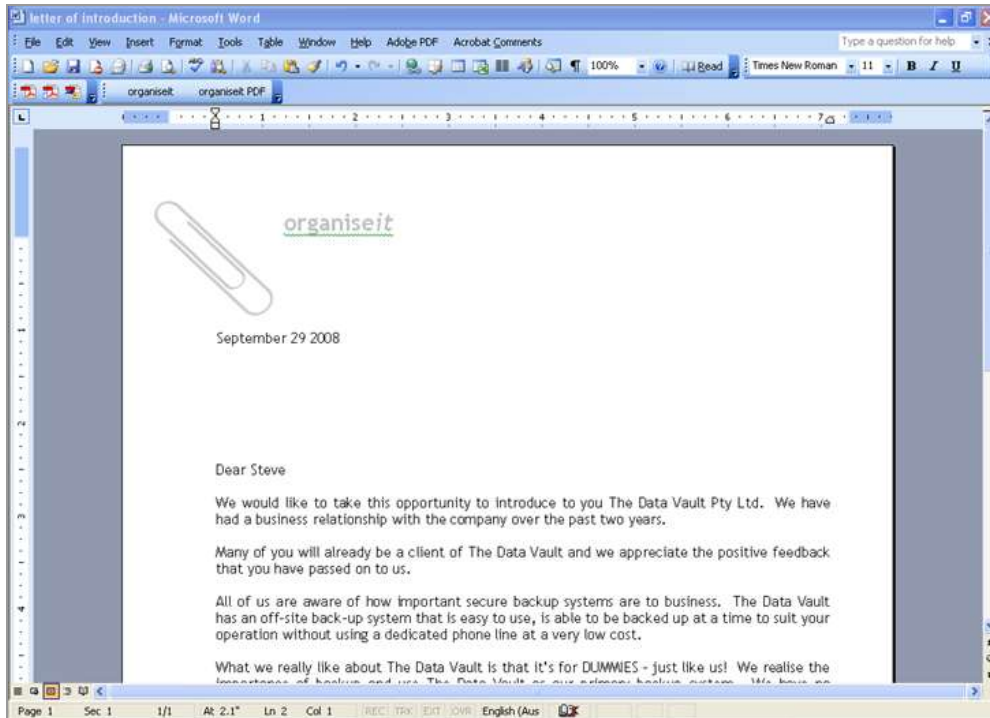
The handling of Microsoft Word documents, as they are placed in to organise*it* has lead, in the past, to some confusion. This confusion has arisen from the fact that when a Word document was placed in the database, the fonts of the copied document would change. This was due to a template issue, which has been rectified in the new version of organise*it*.

Additionally, when you choose to place a MS Word document in to the organise*it* database, it is initially attached to the mouse pointer and you are required to drop it into the appropriate database folder. An issue arising from this procedure is the inadvertent loss of that document through accidentally dropping it. It is now possible to recover that document and repeat the procedure to properly file it in the database.


## HANDLING MS WORD DOCUMENT FONTS

In this exercise, we will demonstrate how **organiseit** now properly handles MS Word documents and maintains the fonts and other formatting that you apply.

- 1 Ensure that you have MS Word open and that you are viewing the document that you want to place in to the **organiseit** database



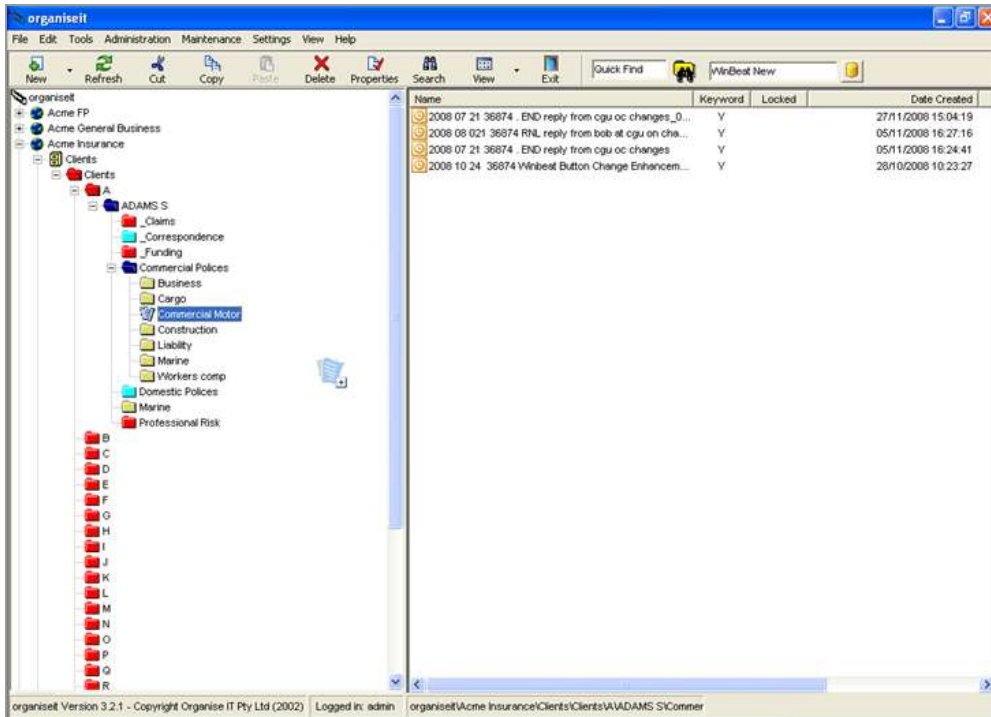
*We will click on the **organiseit** button to place a copy of the document in to the database...*

- 2 Click on the **organiseit** tool  to make a copy of the document and switch to the **organiseit** database

*The **organiseit** database will be displayed and the Word document will be closed in the background - this enables the correct formatting (generated from the template applied to the document) to be maintained by the Word document...*

# organiseit - v3.2.1 USER GUIDE - UPGRADE

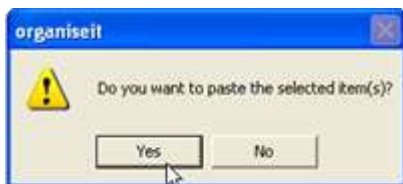
## Handling Microsoft Word Documents



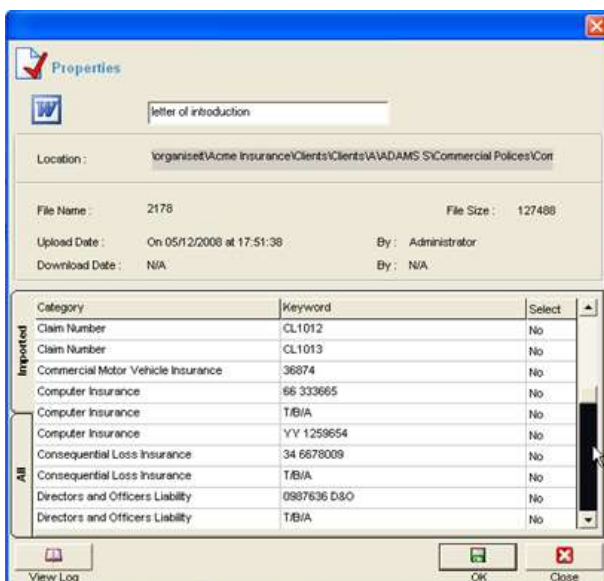
Notice also that the MS Word document is “attached” to the mouse pointer - you are required to click on the folder in to which you want to place the document...


- 3 Locate and click on the folder in to which you want to place the document

You will be asked if you want to paste the selected item...

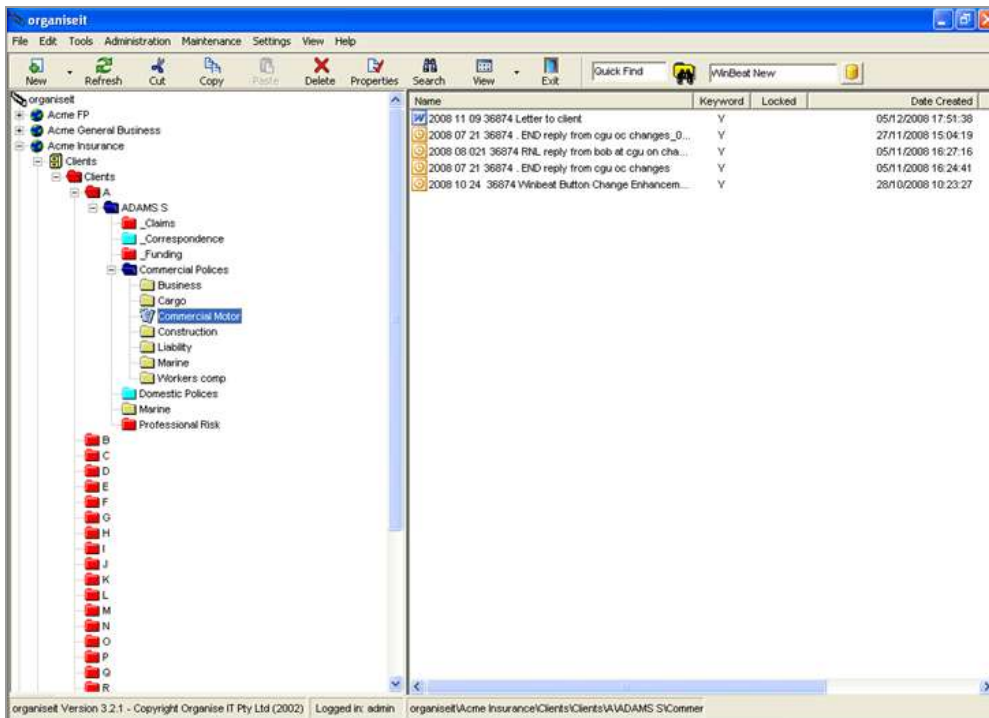


- 4 Click on **Yes** to display the **Properties** dialog box



- 5 Complete the **Properties** as required, then click on **OK**  to save it to the database

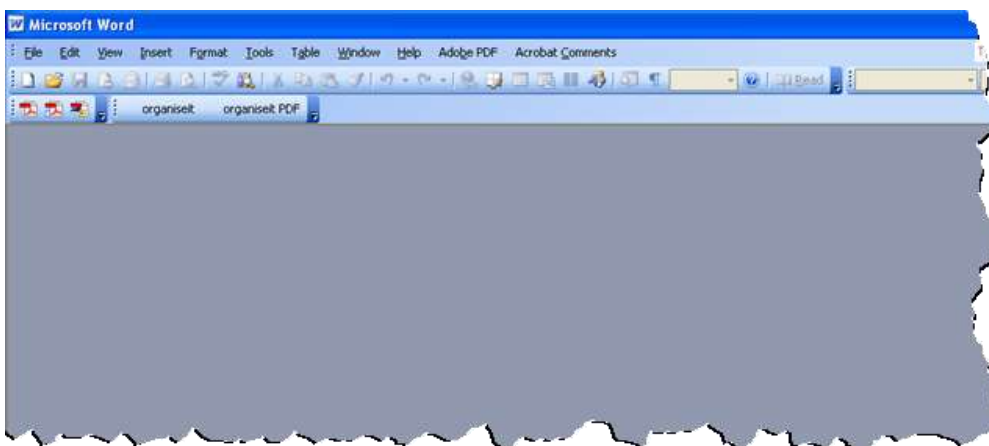
*The document is now apparent at the top of the list in the right pane...*




*Now when you reopen the document in MS Word, you will see that the formatting has not changed. Before we reopen the document, let's just see that it has actually been closed within Word...*

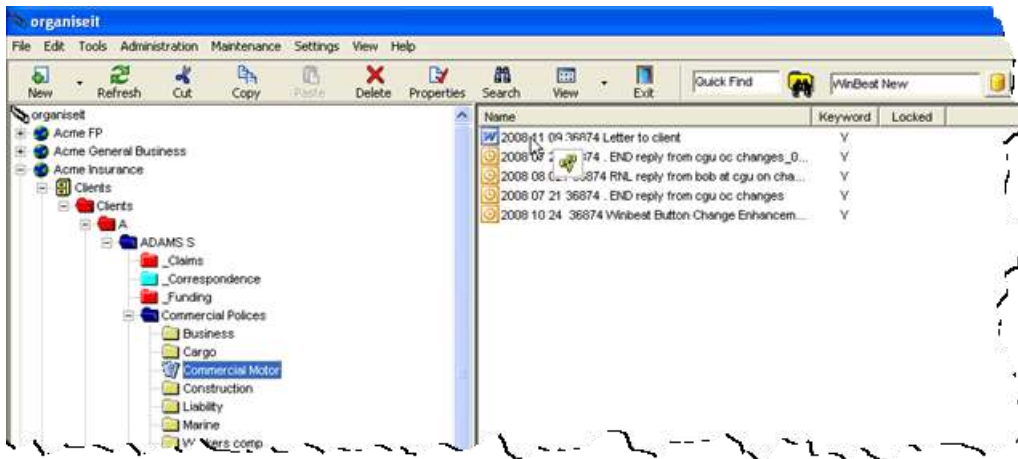
- 6 Click on the **Microsoft Word** tool  in the Task Bar at the bottom of the screen, to switch back to MS Word

*The original document is no longer open - this enables MS Word to maintain the document's original formatting...*



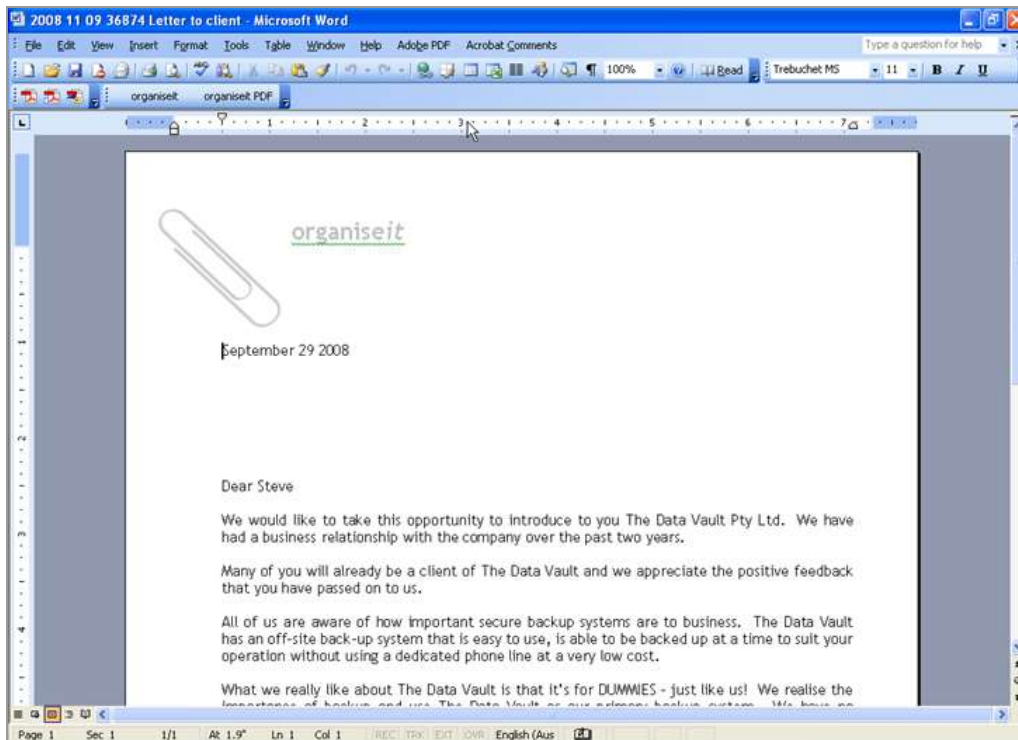
*Now let's return to organiseit to open the document and check the formatting...*

- 7 Click on the **organiseit** tool  in the Task Bar at the bottom of the screen, to switch back to organiseit
- 8 Locate the Word document



9 Double-click on the document to open it in Microsoft Word

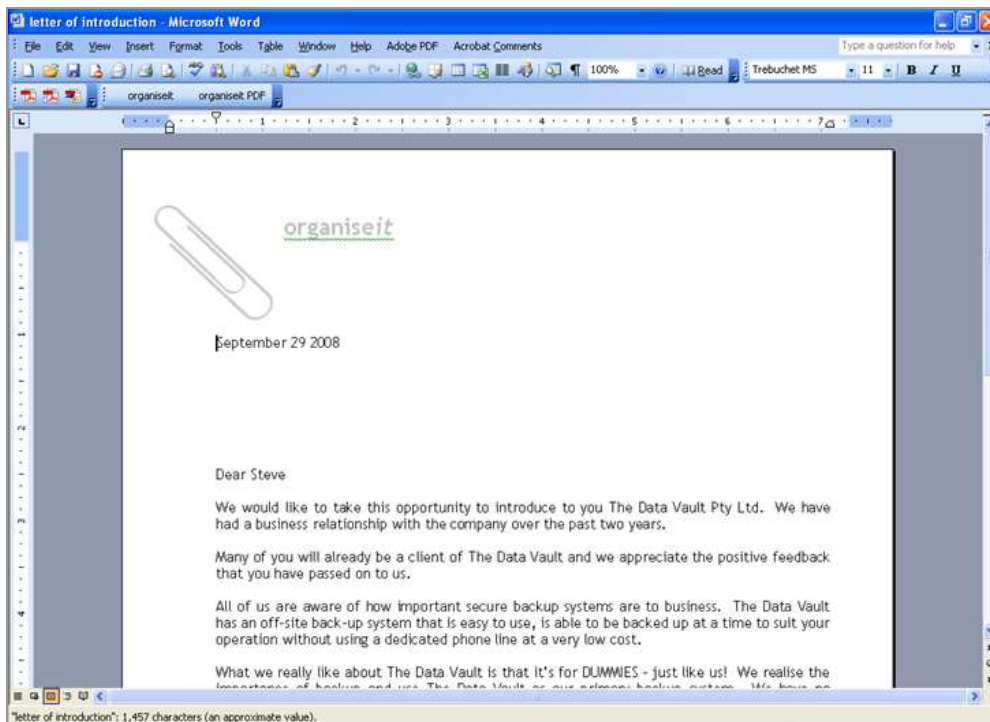
*All of the fonts and formatting have remained the same...*




## HANDLING MS WORD DOCUMENT PLACEMENT

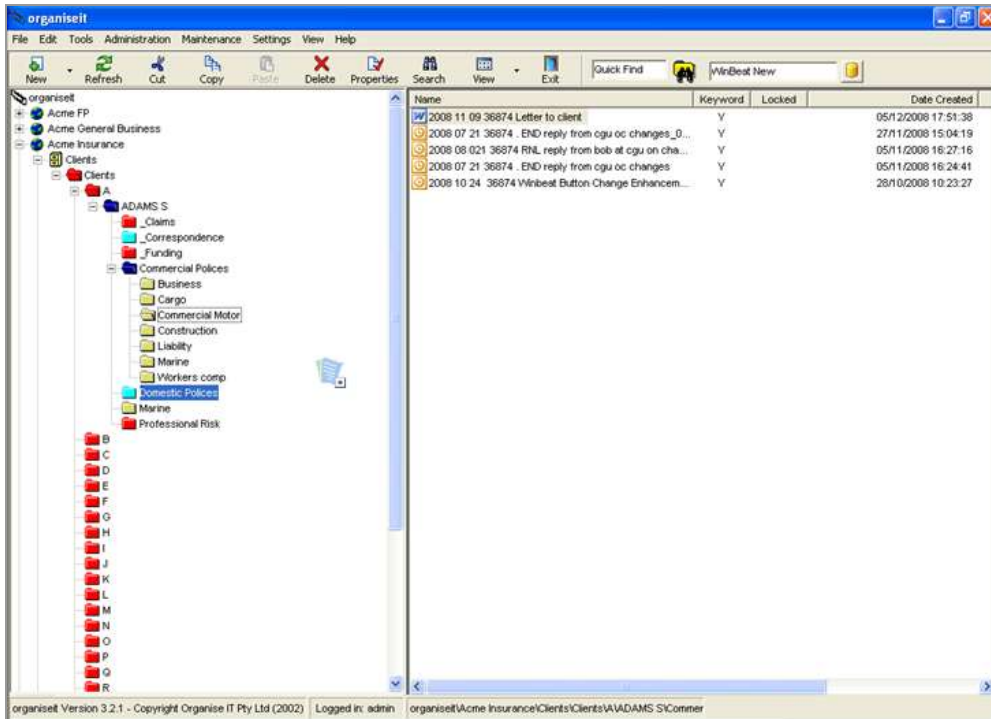
In this exercise, we will demonstrate how *organiseit* now handles MS Word documents that are inadvertently dropped, prior to selecting the correct folder, and how you can retrieve the document.

- 1 Ensure that you have MS Word open and that you are viewing the document that you want to place in to the *organiseit* database



*We will click on the **organiseit** button to place a copy of the document in to the database...*

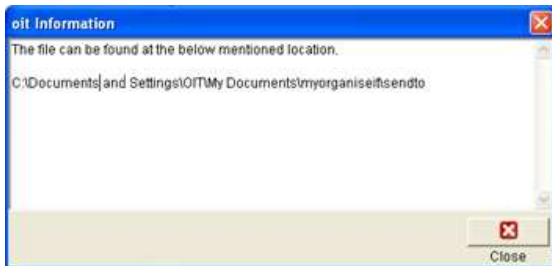
- 2 Click on the **organiseit** tool  to take a copy of the document across to the database  
*The document will be “attached” to the mouse pointer...*




Now let's assume that we inadvertently drop the document - this can occur by clicking the mouse prior to highlighting a folder...


- 3 Move the mouse pointer down the left pane, until it is positioned over any bare white space, then click the mouse to "drop" the document

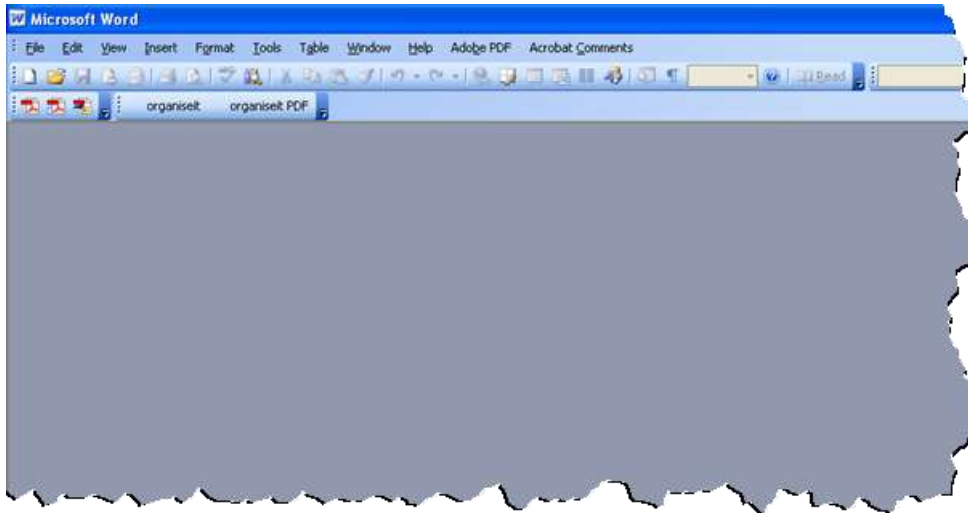
An Information box appears - this indicates the location to which the document has been sent and can be retrieved from...



- 4 Click on **Close**  to close the information box

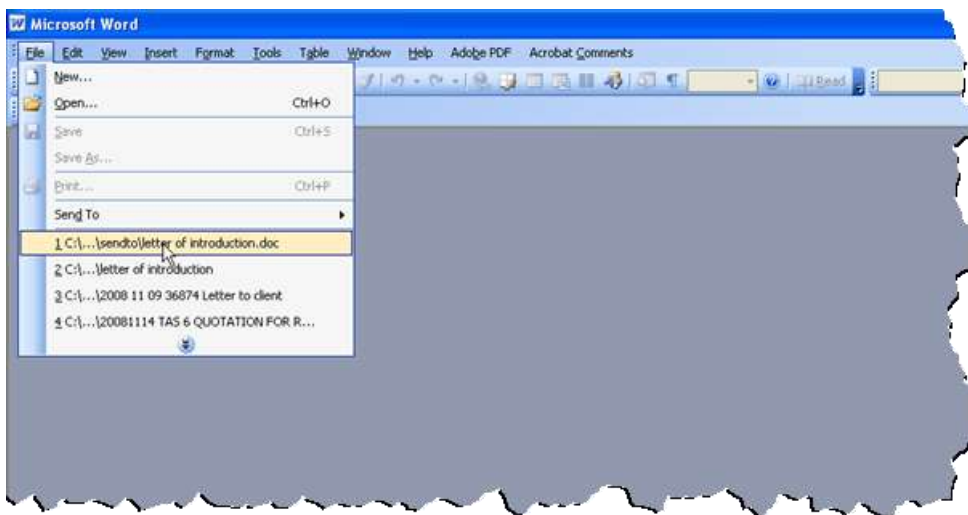
Let's now return to Word to recover the document...

- 5 Click on the **Microsoft Word**  in the Task Bar at the bottom of the screen, to switch back to MS Word



- 6 Click on the **F**ile menu, then locate the document you copied at the beginning of this exercise

*This document should be listed at the top of the Recently Used Files list, as it was the last document we had open in MS Word...*



- 7 Click on the document to open it

*Word will now retrieve the document from the folder previously listed in the Information box...*

organiseit - v3.2.1 USER GUIDE - UPGRADE  
Handling Microsoft Word Documents

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*For this process to work, you must complete the retrieval prior to closing the organiseit database...*

## Check Out Documents for Email

When you need to send documents stored within organise*it*, via email, you need to check them out to a folder and then you can use your email application to locate, attach and send them.

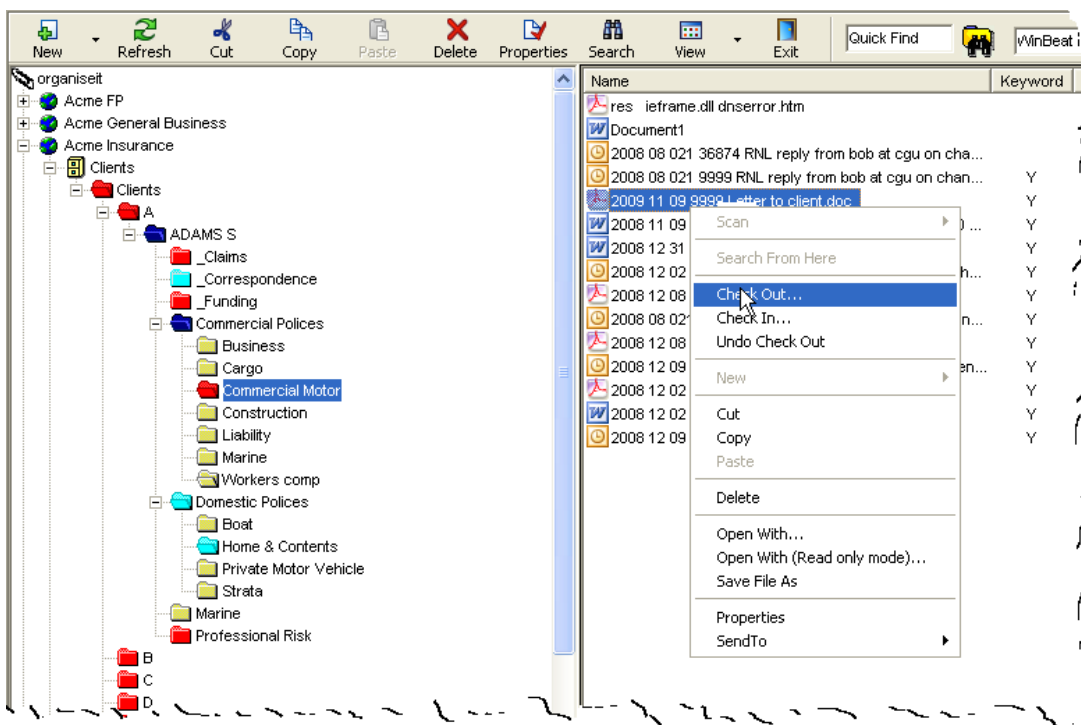
Once you have emailed those documents, you need to reverse the check out procedure so that they are usable within the database once more.

## CHECKING OUT DOCUMENTS FOR EMAIL

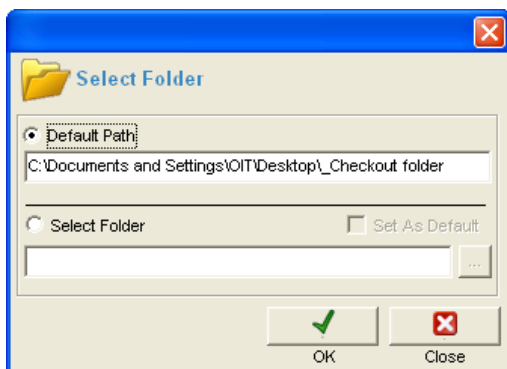
In this exercise, we will check out three documents, located within different *organiseit* folders and then attach those documents to an email to send. Once this is completed, we will undo the check out of those same documents.

- 1 Ensure the *organiseit* database is open, then click on the plus icons  $\oplus$  to locate the first document that you want to check out
- 2 Right-click on the document to display the shortcut menu

*Notice the Check Out option...*




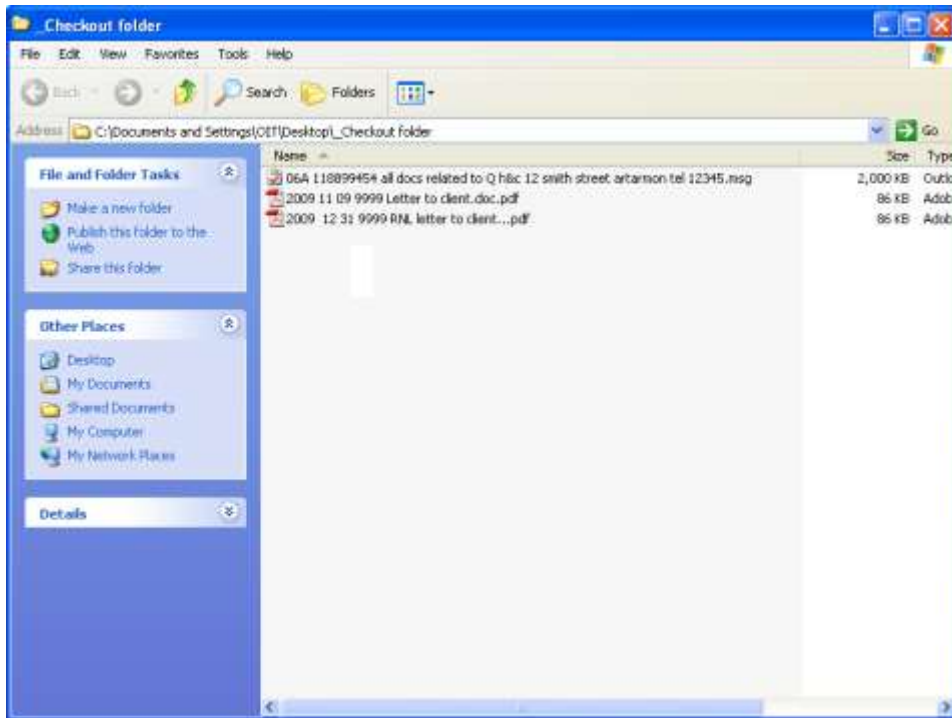
- 3 Click on **Check Out** to display the **Select Folder** window



- 4 Type in a **Default Path** or click on **Select Folder** and locate an alternate folder

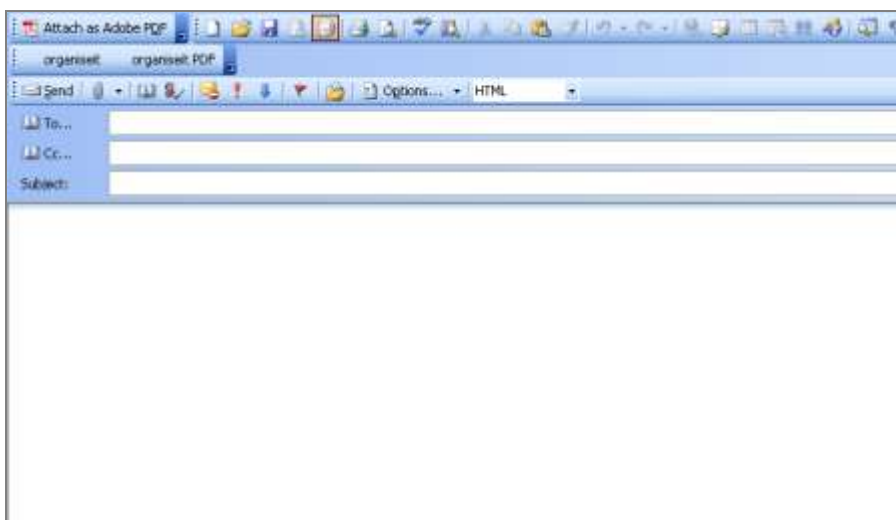
*The documents that you check out will be stored in the nominated folder...*


- 5 Click on **OK**  to complete the check out procedure for this document
- 6 Repeat steps 1 to 5 to check out the other documents that you want to send with the same email  
*You can open the folder to check its contents...*
- 7 Locate and open the nominated folder  
*As the folder used in this example was on the desk top, it was very easy to locate and open...*

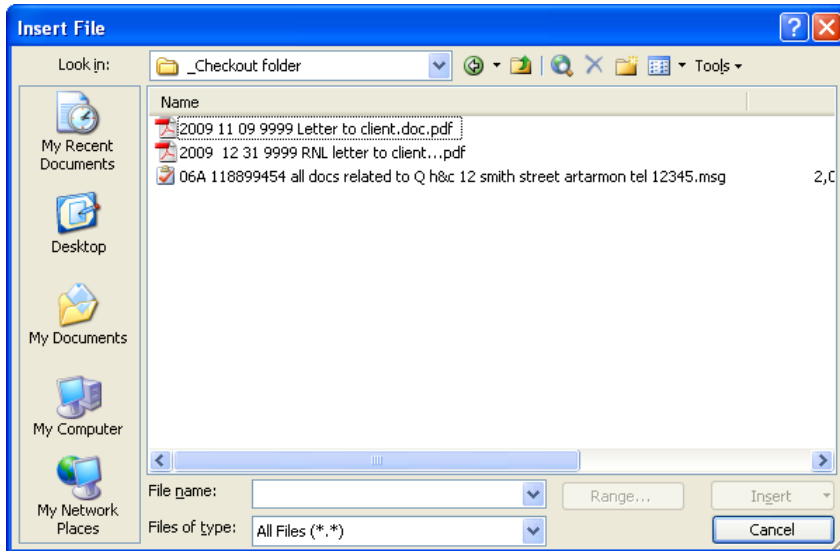


*Here you can see the three documents that have been checked out and that we wish to email. Now we can close this window and open our email application - in this instance, Microsoft Outlook...*

- 8 Close the folder window, then open your email application and create a new message

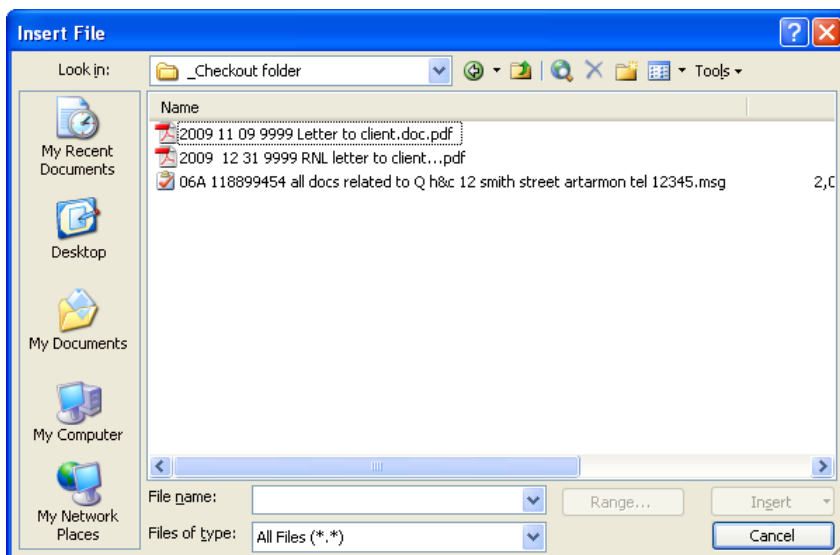


- 9 Click on the **Insert File** tool  (or other appropriate tool in other email applications)



10 Locate and open the folder in which the checked out documents were stored

*Now you can select all of the documents and attach them...*



11 Select the documents and click on **Insert**  to add them to the email

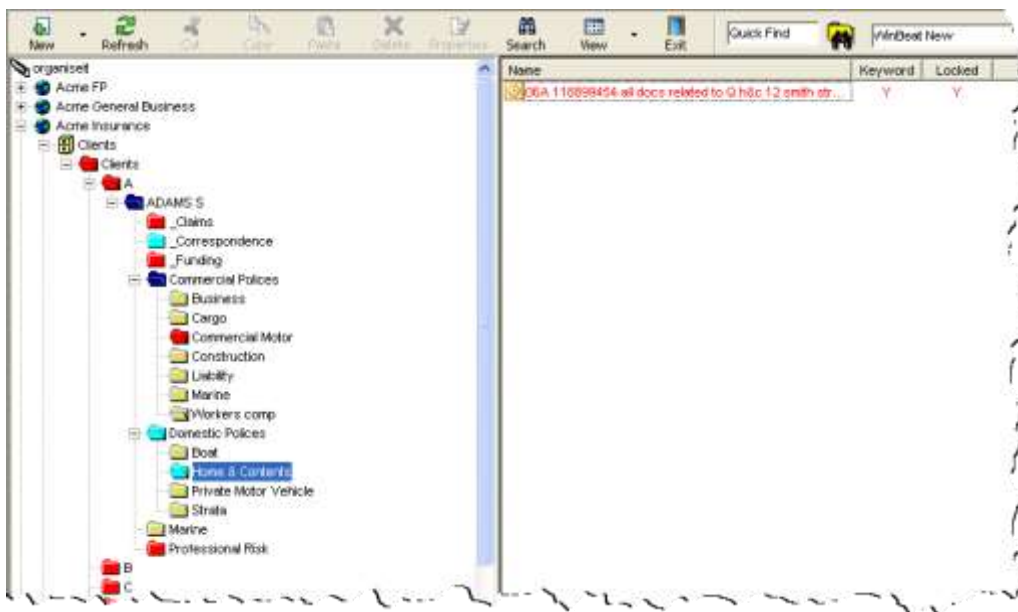
12 Send the email in the usual manner

## UNDOING DOCUMENT CHECKOUT

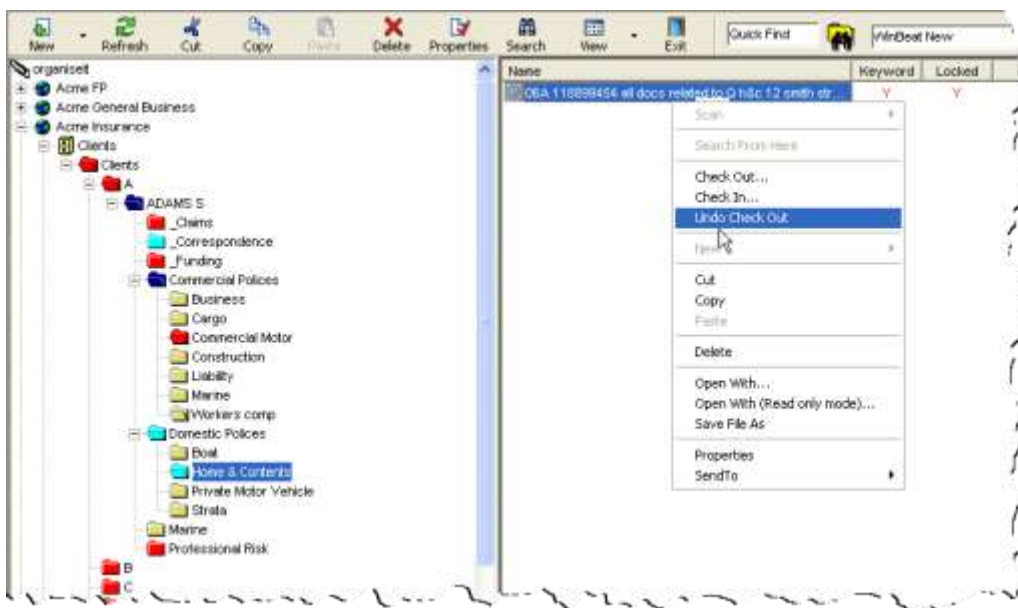
Once you have checked out documents and sent them via email, you will then need to undo the checkout to make the documents available once more in the database. Note that this process uses the **Undo Check Out** command and not the **Check In** command. The latter command will create a copy of the file, whereas the **Undo Check Out** command reverses the status of the current document.

- 1 Ensure that you have organiseit open, then locate the checked out document

*Notice that as the document is checked out, it appears in red type and its status is Locked...*



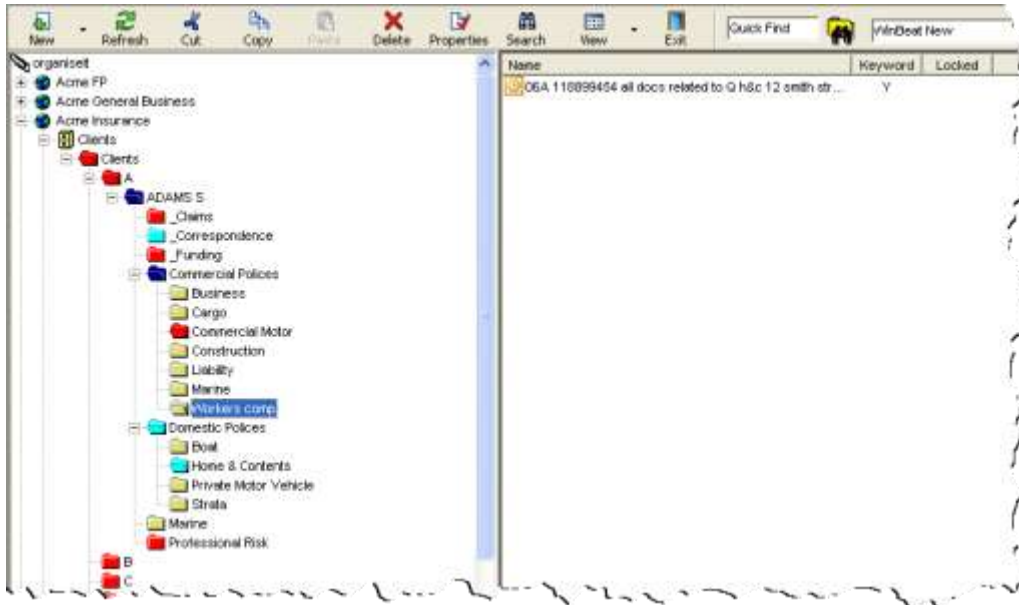
- 2 Right-click on the checked out document to display the shortcut menu



- 3 Click on **Undo Check Out** to reverse the status of the document

*The document is no longer locked and appears in black text once more...*

Undoing Document Checkout



4 Repeat steps 1 to 3 for the other checked out documents

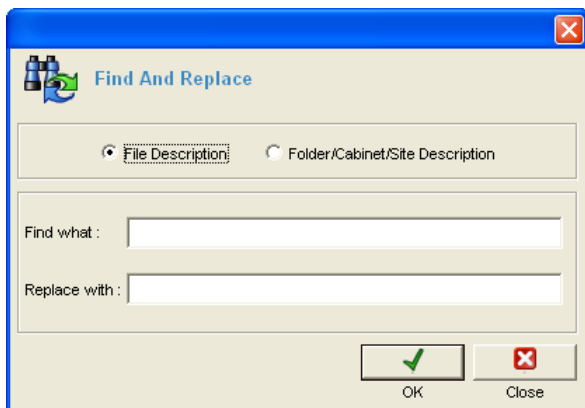
## Find and Replace

The Find and Replace functionality has been included in the new version of the database as it was found that many files had forward slashes (/) in them when moved out of the database. The Find and Replace function enables you to locate these files and replace the “/” with another character.

## FIND AND REPLACE

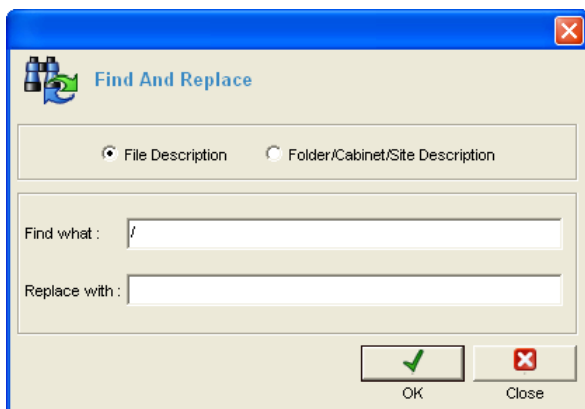
In this exercise, we will demonstrate how to use the *Find and Replace* function to rename files.

- 1 Ensure that *organiseit* is open, then click on **Maintenance** in the menu bar and select **Find and Replace** to display the *Find And Replace* dialog box



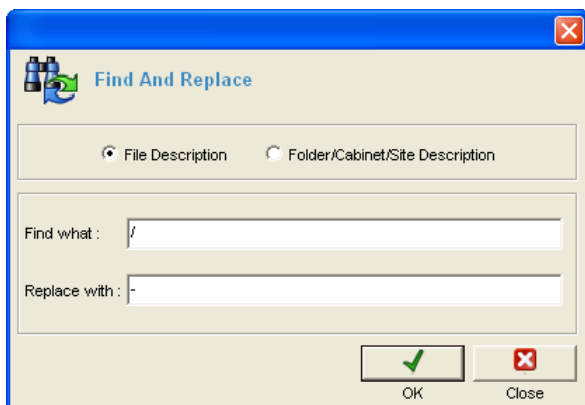
- 2 Click in *Find what* and type the character(s) you are looking for


*In this instance, we want to find all of the instances of a forward slash (/)...*



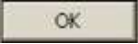
- 3 Click in *Replace with* and type the character(s) you want to replace the above with


*In this instance, we want to replace each "/" with a dash "-"...*



- 4 Click on **OK**  to conduct the find and replace

*Depending on how many instances are found, this might take a while. A message box will be displayed when Find and Replace has finished...*

- 5 Click on **OK**  to return to the **Find And Replace** dialog box

- 6 Repeat steps 2 to 4 to conduct another find and replace event, or click on **Close**  to close the dialog box