Document Solo - Installation Instructions

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## How to install Document Solo from CD-ROM
1. Insert the Document Solo CD-ROM into your computer.
2. Open the CD-ROM drive in File Explorer and double click on **setup** to run the installer.
3. Follow the setup installation wizard instructions.

How to install Document Solo from a download file
1. Use your web browser to download the **SoloSetup.exe** from the Keplens website and save it to your computer.
2. Open Windows File Explorer and find the S**oloSetup.exe** file you downloaded to your computer. Then double click on the file to start the setup.
3. Follow the setup installation wizard instructions.
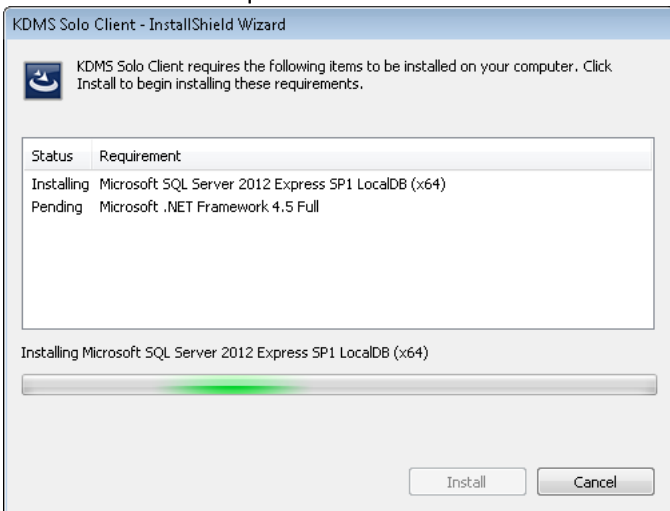
Setup Installation Wizard Instructions
1. Setup may ask to install the requirements. Click on the "Install" button.
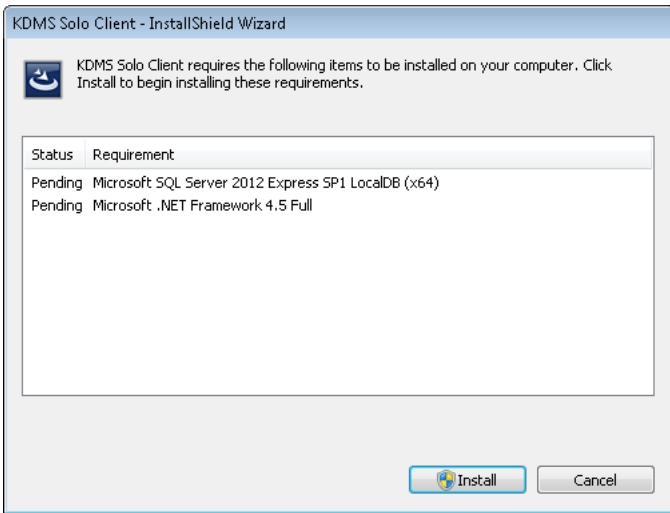
2. User Account Control will ask if you want to allow Setup.exe to make changes to your computer. Click the "Yes" button.
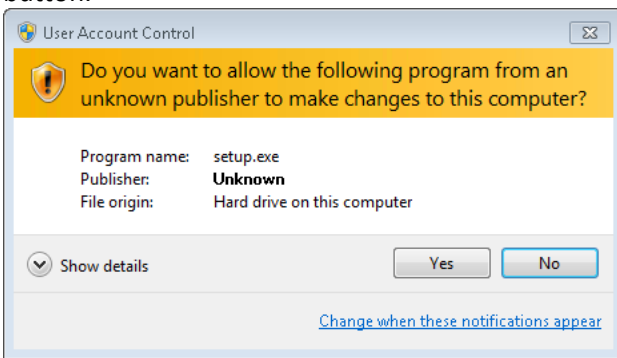
3. Wait while the requirements are installed.

4. After the requirements have been installed, setup will continue onto the Document Solo installer.

5. Welcome to the InstallShield Wizard for Document Solo. Click the "Next >" button.

6. Licence Agreement. Read then accept the licence agreement by selecting "I accept the terms in the license agreement". Click the "Next >" button to continue.

7. Destination Folder. You may change the folder where the program installed but it is recommended to keep the default destination. Click the "Next >" button to continue.
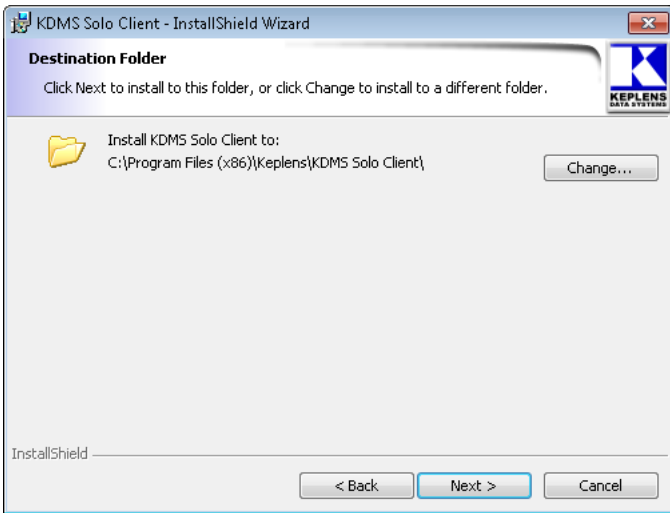
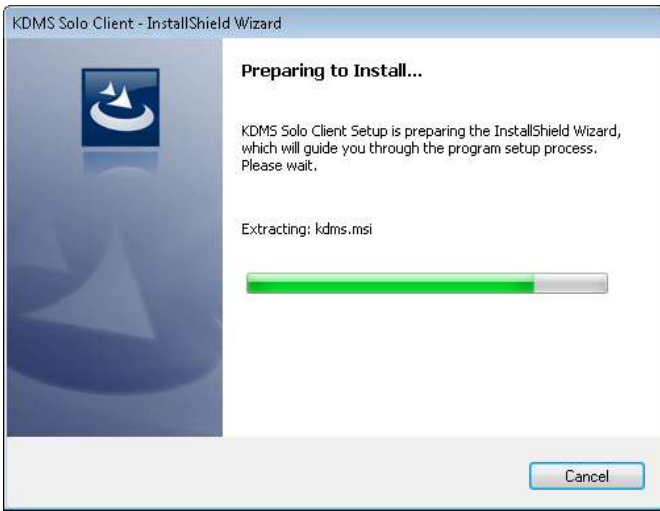8. Ready to Install the Program. Click the "Install" button.
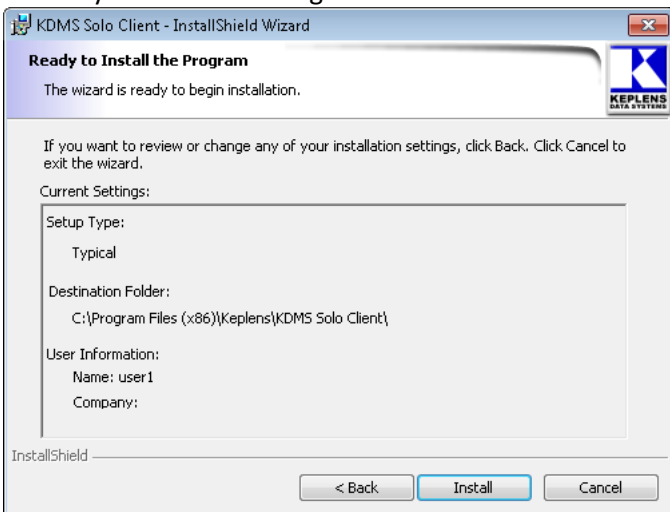
9. User Account Control will ask if you want to allow kdms.msi to make changes to your computer. Click the "Yes" button.
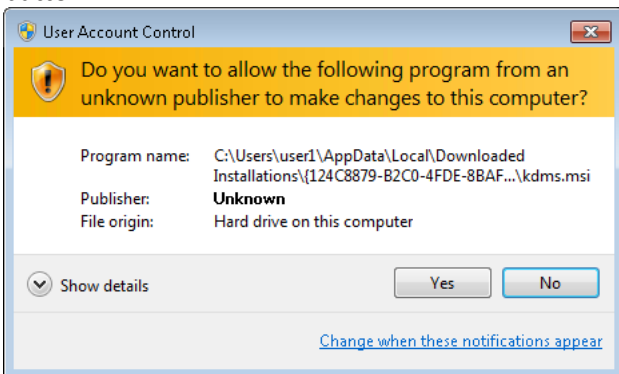
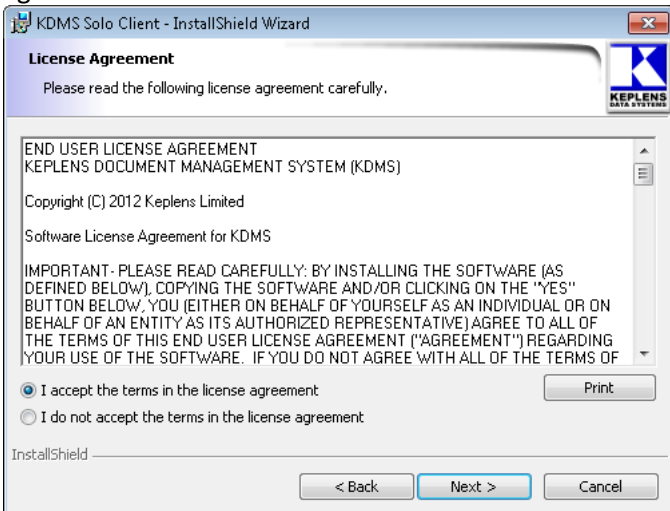10. Wait while the Document Solo is installed.
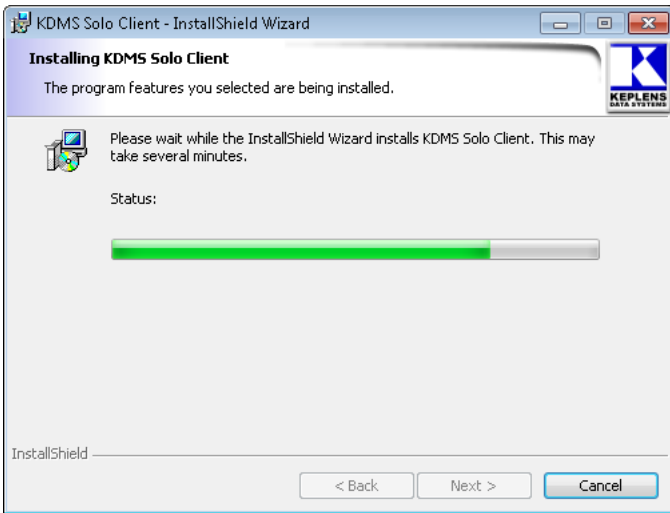
11. InstallShield Wizard Completed. Click on the "Finish" button.
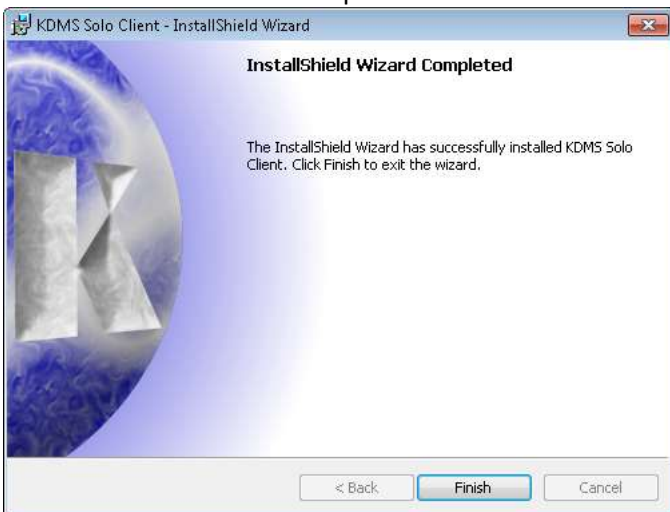
How to install Adobe Reader

Document Solo requires Adobe Reader to be installed on your computer. You will receive the following message if you try to run the program without Adobe Reader.

Please visit the Adobe web site to install Adobe Reader.
http://get.abode.com/uk/reader/

How to run the Trial version

Document Solo allows you to try the program before you buy a licence. The trial allows you to create up to two filing cabinets with a trial limit of 100 documents per cabinet. These limitations are removed once the program is licensed so you will be able to continue to add more documents to your filing cabinets and create more filing cabinets. There is no time limit to the trial.

1. Run Document Solo using the program shortcut.
2. Click on the "Continue with Trial version" button in the licensing screen.
3. Log On using the program password.
4. Use the program as normal and try all the features.

Trial limitations
- Maximum of 2 Filing Cabinets
- Maximum of 100 documents per Filing Cabinet

How to Licence Document Solo
1. Buy a licence from Keplens Limited by visiting the following web site www.keplens.co.uk and purchasing it online. Your licence serial number and activation key will be emailed to you.
2. Run Document Solo using the program shortcut.
3. Click on the "**Register Licence serial number**" button on the Document Solo trial and licensing screen.
4. If Windows User Account Control asks if you want to allow KDMS.exe to make changes to your computer, click on the "Yes" button.
5. Enter your licence serial number from your email into the **Serial Number** box.
6. Enter your licence activation key from your email into the **Activation Key** box.
7. Click on the "**Register**" button to register online for a Keplens Software Licence for your computer.

How to Log On
Document Solo is intended to be used by only one person and is protected by a single program password.
1. Enter your program password into the Password box. The default password is: **admin**
2. Click on the "OK" button to log on.

Documents
A Document is a file which contains various scanned images and PDF files that appear as pages within the document. You use the In-Tray to select files to add to a document and then save it to the selected Filing Cabinet after you provide the catalogue details for the document.
You can create multiple filing cabinets to hold different types of document. However to get you started Document Solo is shipped with two default filing cabinets – MyHome, for domestic bills, and MyBusiness for supplier invoices. Either or both can be deleted and a new one created in it's place.

How to save a new document
1. Open the In-Tray using Menu > View > **In-Tray**
2. Select an In-Tray from the drop down list in the top left.
3. Click on a file name in the list to highlight and view it. If no documents are visible, there are no documents of correct file type in the In-Tray folder.
4. Tick a file name to add it as a page to the document by clicking on the box to the left of the name. Pages will be added in the order in which you tick the files.
5. Preview the document pages by clicking on the ⬅ left and ➡ right arrow buttons above the page viewer.
6. Rotate images 90⁰ clockwise using the 🔄 Rotate button above the page viewer to fix the orientation of a page.
7. Select the destination Filing Cabinet from the drop down list to the left of the "Save" button.
8. Click on the "Save" button to open the Save Document form.
9. Enter the document details.
10. Click the "Save" button to save the document. The selected page files will be moved from the In-Tray into the Filing Cabinet.

How to find a document
1. Open a Filing Cabinet by clicking on its name in the Menu > **View** list.
2. Click on the "Search" button to open the Search Cabinet form.
3. Enter details for the document you are searching for.
4. Click on the "Search" button to filter the Filing Cabinet list.
5. Double-Click on a row to open a document to view the pages.

How to print a document
1. Open a Filing Cabinet by clicking on its name in the Menu > **View** list.
2. Double-Click on a row to open a document to view the pages.
3. Click on the 🖨 Print button to open the print dialogue.
4. Select the printer settings and pages you wish print.
5. Click on the "Print" button to print the pages.

How to email a document
1. Open a Filing Cabinet by clicking on its name in the Menu > **View** list.

2. Double-Click on a row to open a document to view the pages.

3. Click on the Email button.

4. Click on the "Yes" button to confirm you want to email the document.

5. Your email client program will open a new email message and the document pages will be added as attached files named "Page01", "Page02", etc.

6. Enter your message and the destination email address and then send the email.

How to edit a document

You can change the Filing Cabinet catalogue details and add pages to a document.

You cannot delete a document or delete pages from within document.

1. Open a Filing Cabinet by clicking on its name in the Menu > **View** list.

2. Double-Click on a row to open a document to view and edit the document.

3. Click on the Edit Document button to open the Edit Document window.

4. Edit the Filing Cabinet catalogue fields by typing in the field boxes.

5. To add pages click on the "Add Pages" button to open the Add Pages window. Tick the files from your In-Tray to add and then click on the "Add Pages" button to return to the Edit Document window.

5. Click on the "Save" button to save the changes to the document.

Filing Cabinets

Document Solo uses the concept of Filing Cabinets as a place to safely store your scanned documents on your computer. A scanned document is placed in a filing cabinet by selecting it from an In-Tray folder and then typing in the catalogue details for the document when you save it to the filing cabinet. The catalogue details can then be searched to help you quickly find the document in a filing cabinet.

How to create a Filing Cabinet

1. Click on Menu > Tools > **New Filing Cabinet**

2. Enter a filing cabinet name into the **Name** box.

3. Add a filing cabinet catalogue field by click on the green [+] button.

4. Enter the name of the field into the **Field Name** box. e.g. Supplier

5. Select the field type from the drop down list. e.g. TEXT

DATE	A date field
TEXT	A text field
NUMBER	A number field e.g. 3
CURRENCY	A currency field e.g. £159.99

6. To add a Pick list to a TEXT field:

    a. Tick the box next to the [Pick] button to enable it.

    b. Click the [Pick] button to open the Pick List editor.

    c. Type in the text for an item into the Add box. e.g. Invoice

    d. Click the [Add] button to add the text to the pick list.

    e. Right-Click the mouse button on an item in the pick list to show the menu to "Delete" or "Set as Default Item"

    f. Change the order of the unsorted items by clicking on an item to hightlight it and then click on the Up and Down arrow buttons to move it.

    g. Tick the "Sorted" check box to alphabetically sort the pick list.

    h. When you have finished editing the pick list, click on the [Close] button.

7. To add more filing cabinet catalogue fields, go back to step 3 and continue in the same way.

8. Click on the "Save" button when you have finished adding fields to save the new Filing Cabinet.

How to delete a Filing Cabinet

You can delete a Filing Cabinet from the database. As a safety measure the document files will not be deleted but instead moved to an archive folder in the Filing Cabinets folder with the cabinet's name and today's date.

1. Click on Menu > Windows > **Close All** to close any windows that are open within Document Solo.

2. Click on Menu > Tools > **Delete Filing Cabinet**

3. Select the Filing Cabinet name that you wish to delete from the drop down list.

4. Click on the "Delete" button to delete the filing cabinet.

5. Confirm you wish to delete the filing cabinet by clicking on the "Yes" button.

Settings

How to change the password
1. Click on Menu > Tools > **Change Password**
2. Enter the old password.
3. Enter the new password.
4. Enter the new password again to confirm it.
5. Click on the "OK" button to change the password.

How to add an In-Tray
You can add your own In-Tray to point to a folder you scan documents to.
1. Close the In-Tray if it is open by clicking on the [X] in the top right of its window.
2. Click on Menu > Tools > **Change In-Trays**
3. Find the last row in the table which will have a "*" in the row header.
4. Enter a name into the **In-Tray Name** column by clicking in the box and typing.
5. Click on the Browse button to open the **Browser For Folder** dialogue box.
6. Select the In-Tray folder by highlighting the name in the tree view and then click on the "OK" button. The selected path will appear in the **In-Tray Path** column.
7. Click on the "Save Changes" button to save the In-Tray list.

How to change an In-Tray
You can change the name and paths to your existing In-Trays using the User In-Trays editor.
1. Close the In-Tray if it is open by clicking on the [X] in the top right of its window.
2. Click on Menu > Tools > **Change In-Trays**
3. Change an In-Tray Name by clicking on the box and editing the text.
4. Change an In-Tray Path by clicking on the Browse button and selected a different folder. Or you can click on the box and edit the text.
5. Delete an In-Tray by clicking on the row header to highlight the whole row and then press the "Delete" key on your keyboard.
6. Click on the "Save Changes" button to save the new In-Tray list.

Maintenance

How to backup Document Solo
1. Click on Menu > Windows > **Close All** to close any windows that are open within Document Solo.
2. Click on Menu > Tools > **Backup**
3. Click on the "..." browse button to find and select a destination folder for the backup and then click on the "OK" button. The selected path will be show in the box.
4. Click on the "Backup" button to begin the backup process.
5. Click on the "Yes" button to confirm you want to backup Document Solo.
6. Wait for the backup to complete.
7. The backup will be stored in a sub-folder with a name starting with "KDMS" and ending with today's date. This is the folder you will select to restore the backup.

How to restore a backup
WARNING: A safety feature of the Filing Cabinets Restore function prevents it from restoring document files over existing files. You must manually rename or move the existing Filing Cabinet folders using Windows File Explorer.
1. Use Windows File Explorer to move or rename the existing cabinet folders in the Filing Cabinet folder. The default location is C:\ProgramData\Keplens\KDMSsolo\Cabinets\
2. Start Document Solo from the program shortcut and log on.
3. Click on Menu > Windows > **Close All** to close any windows that are open within Document Solo.
4. Click on Menu > Tools > **Restore**
5. Click on the "..." browse button to find and select the "KDMS" backup folder and then click on the "OK" button. The selected path will be show in the box.
6. Click on the "Restore" button to begin the restore process.

7. Click on the "Yes" button to confirm you want to restore Document Solo.

8. Wait for the restore process to complete.

9. After the restore has completed it will show a message and then it will close the Document Solo program.

10. Start Document Solo from the program shortcut and log on using the original password from the time of the backup.

How to check for updates

1. Click on Menu > Windows > **Close All** to close any windows that are open within Document Solo.

2. Click on Menu > Help > **Check For Updates**

3. If an update is available:

      a. Click on the "Yes" button to download the update. The program will close and start the update.

      b. If you receive a User Account Control "Do you want to allow this program to make changes to your computer?" message, click on the "Yes" button.

      c. Click on the "Yes" button to confirm you want to install the update.

      d. Wait for the update to finish. It will restart the Document Solo program once the update is complete.