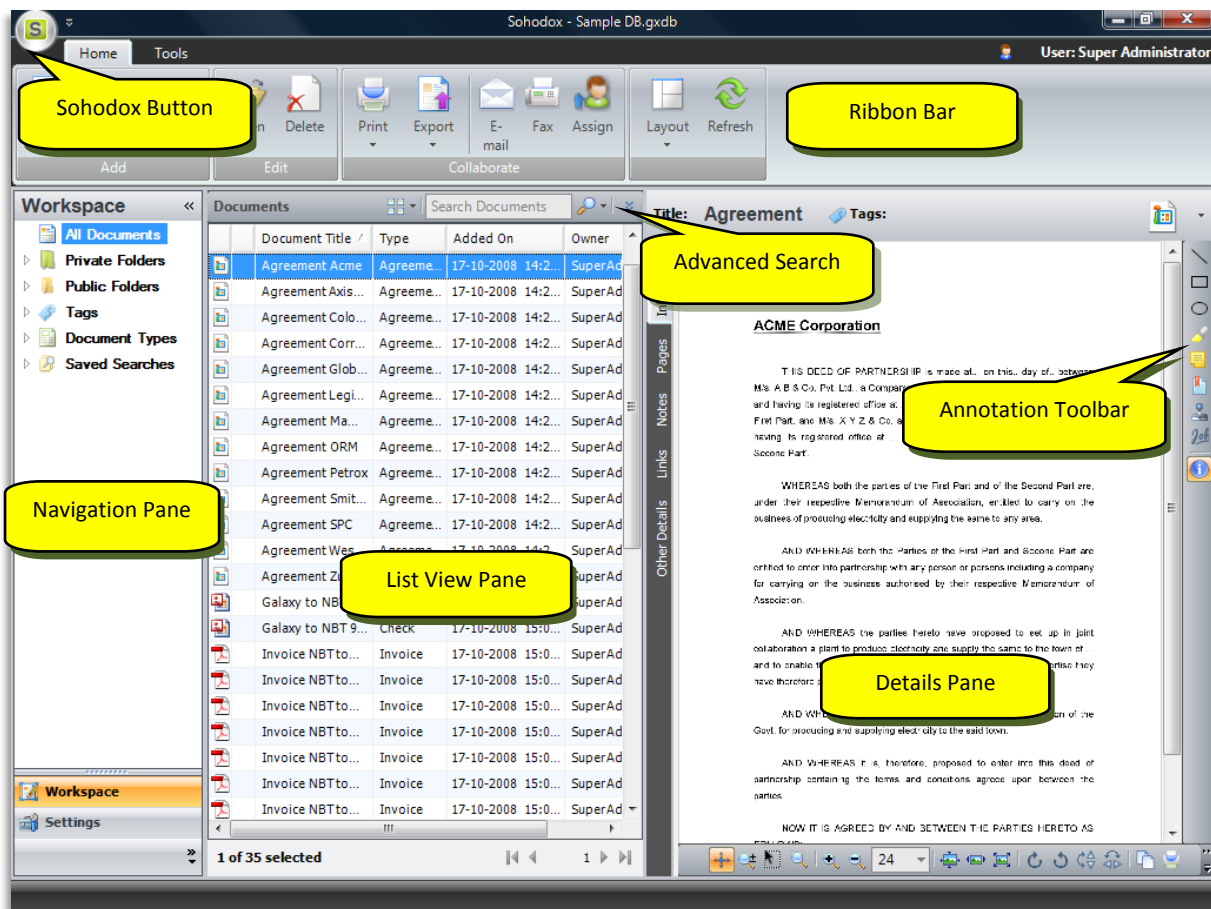# sohodox

Quick Start Guide

Starting Sohodox

Click on *Start* > *All Programs* > *Sohodox* or double click Sohodox icon desktop to run Sohodox.

Login as *Superadmin*.

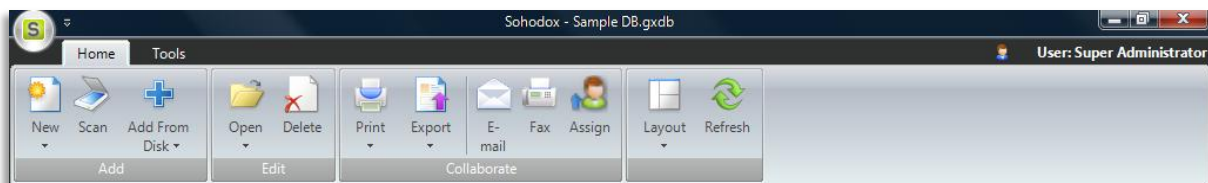**Username:** superadmin

Password: superadmin

Main Window

Sohodox Interface

The Sohodox Main window is divided into four main parts...

1. Ribbon bar
2. Navigation Pane
3. List View Pane
4. Details Pane

1. RIBBON BAR

Sohodox user interface is similar to the familiar MS Outlook user interface. The menus are replaced with the Ribbon bar. The Ribbon bar is divided into tabs (Home and Tools), which group related features together. This makes all important tools and features of Sohodox very easily accessible.

The Ribbon bar can be minimized by right clicking on the Ribbon bar and selecting the *Minimize the Ribbon* option. You can also double click the ribbon bar tabs to minimize it.
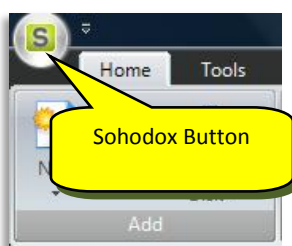
Sohodox Button: Use the Sohodox button to login and logout of Sohodox. You can also access the Options window from here.
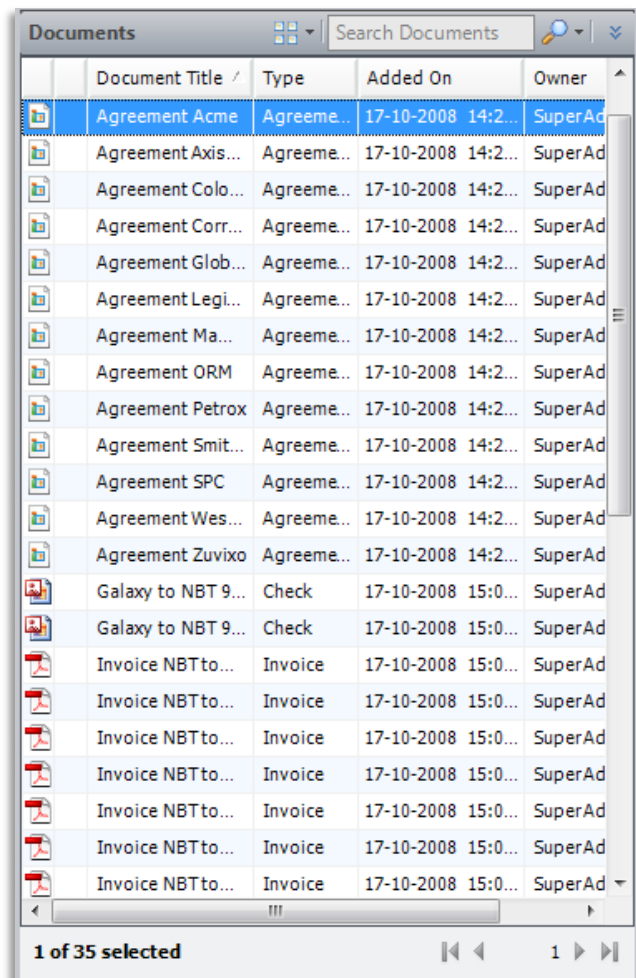
2. NAVIGATION PANE

Navigation Pane

The Navigation pane gives you quick access to all items that you will need to work with (e.g. All Documents, Folders). The Navigation pane contains navigation groups (e.g. Workplace, Settings) which in turn contain navigation items (e.g. All Documents, Private Folders). Selecting a navigation item displays the related information in the list view. The Navigation pane appears on the left side of Sohodox window.

The Navigation pane can be minimized by clicking the Double Arrow on the top right corner of the Navigation pane.

3. LIST VIEW PANE

This pane lists (displays) multiple documents at a time. At a time, 50 documents are displayed on the List View pane. To view more documents use the Navigation buttons below the List View pane. The order of the columns in the List View pane can be changed by dragging the column header and dropping it to the position you want. To remove a column from the List View pane, right click the olumn header and deselect the column from the column list. Click the column header to sort in the ascending or descending order of values in that column.

Quick Search: Use the Quick Search box to find documents quickly. When you move your mouse arrow on the Quick Search box, it will show you the fields that are going to be searched. Type the document name or part of the document name and hit Enter to find that document.

List View Pane

Advanced Search: Use the Advanced Search to narrow down the search results and to make it more specific, by adding conditions to your query. Click the double arrow besides the Quick Search box to display the Advanced Search pane.

E.g. Lets say you want to view all documents added by John on December 10 2007. By using the query below you will get all the documents added by John on December 10 2007...

Owner Equals to John

Added On 12/10/2007

Advanced Search Pane

4. DETAILS PANE

This pane lists a single item at a time. When a document is selected in the List View pane its information is displayed in the Details pane. On the left of the Details pane there are tabs, which display, the information/properties of the selected item. The Annotation toolbar is on the right and the Image toolbar is at the bottom.
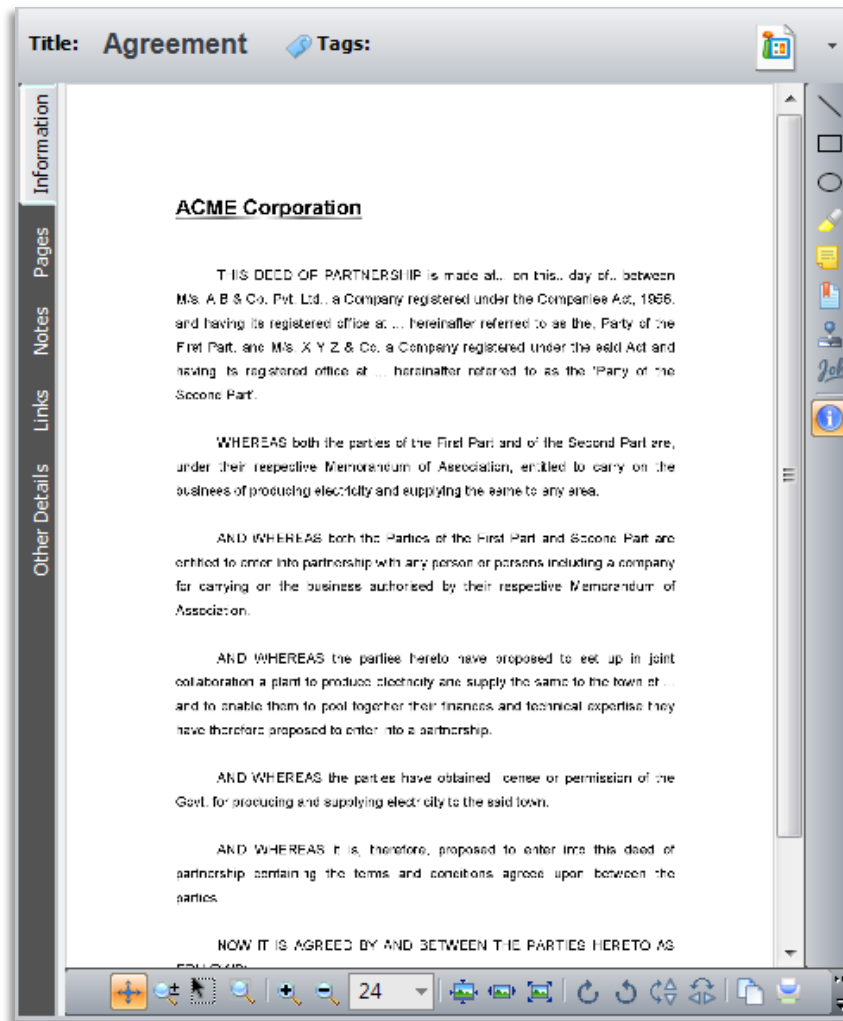
Details Pane

Managing Your Documents

In Sohodox you can manage your documents using any of the following methods...

- Folders
- Tags
- Document Types

You can also use a mix of the above methods.

Folders: This is the simplest and easiest way of managing your documents. You can create a folder hierarchy and then place the documents in the appropriate folders. You can also import your existing folder structure from Windows Explorer by dragging and dropping the folder structure onto a folder in Sohodox. The dropped folder, all it's sub-folders along with any files in them will get added to Sohodox. The folder structure in Sohodox is stored inside a database. Therefore viewing folder contents, moving documents between folders or moving folders themselves is very fast.

There are two types of folders:

Private Folders: Any folders and sub-folders a user creates under the Private Folders node are termed as that user's private folders. Each user has her own set of Private Folders which are not visible to any other user (except the superadmin). Any documents you add to a private folder are considered private documents. Private documents are not visible to other users (except the superadmin). Also you are set as the owner of any documents you add. An owner of a document can modify or delete that document.

You can change ownership of a document, by assigning the document to another user. In this case the document becomes the other user's private document and is no more visible to you.

Public Folders: You can make a document public by moving it from your private folder to a public folder. Any folders and sub-folders a user creates under the Public Folders node are termed public folders. Public folders are visible to all users. Any documents you add to a public folder are considered public documents. Public documents can be viewed and modified by any user. Public documents can only be deleted by the owner of the document (or by the superadmin).

Any public document that you own, can be made private again by moving it to any of your private folders.

Documents you directly add to the All Documents node, a Tag node or a Document Type node are considered your private documents

Tags: Tags are keywords that can be attached to documents. You can attach multiple tags to each document. Tagging is a quick way of indexing your documents. Documents can be searched, sorted or grouped based on their tags.

In a lot of situations you will find just using the combination of Folders and Tags to be a very powerful way to manage your documents.

Document Types: Document Types allows you to use a more structured approach to manage your documents. Using Document Types, you can store specific indexing information with each document (for e.g. store Invoice Number, Invoice Date, Invoice Amount with each stored Invoice and store Sender Name, Date with each stored Letter).

The main advantage of this approach is that detailed information about each type of added document can be captured by creating very specific data fields. Doing this also increases the number of ways you can look for documents.

Sohodox ships with a few Document Types built-in such as Invoices, Checks etc. ready for your use. If required you can easily modify these Documents Types by adding additional indexing fields or removing any existing indexing field. You can also delete any of these Document Types if you do not intend to use them. You can also create entirely new set of Document Types more suited to the type of documents you wish to manage.

Working with Documents

When you start Sohodox, the default node selected is All Documents. You can change the default node that is selected on start-up from the Options window (Sohodox button > Options).

The All Documents node displays all documents that the currently logged in user is allowed to view. At a time, 50 documents are displayed in the List View pane. To view more documents use the navigation buttons at the bottom of the List View pane. To view documents as Thumbnails click the Views button that is located towards the left of Search box and then choose Small Thumbnails, Medium Thumbnails or Large Thumbnails (thumbnails are only displayed for image files). Select the List View option from the Views drop-down to view documents as a list.
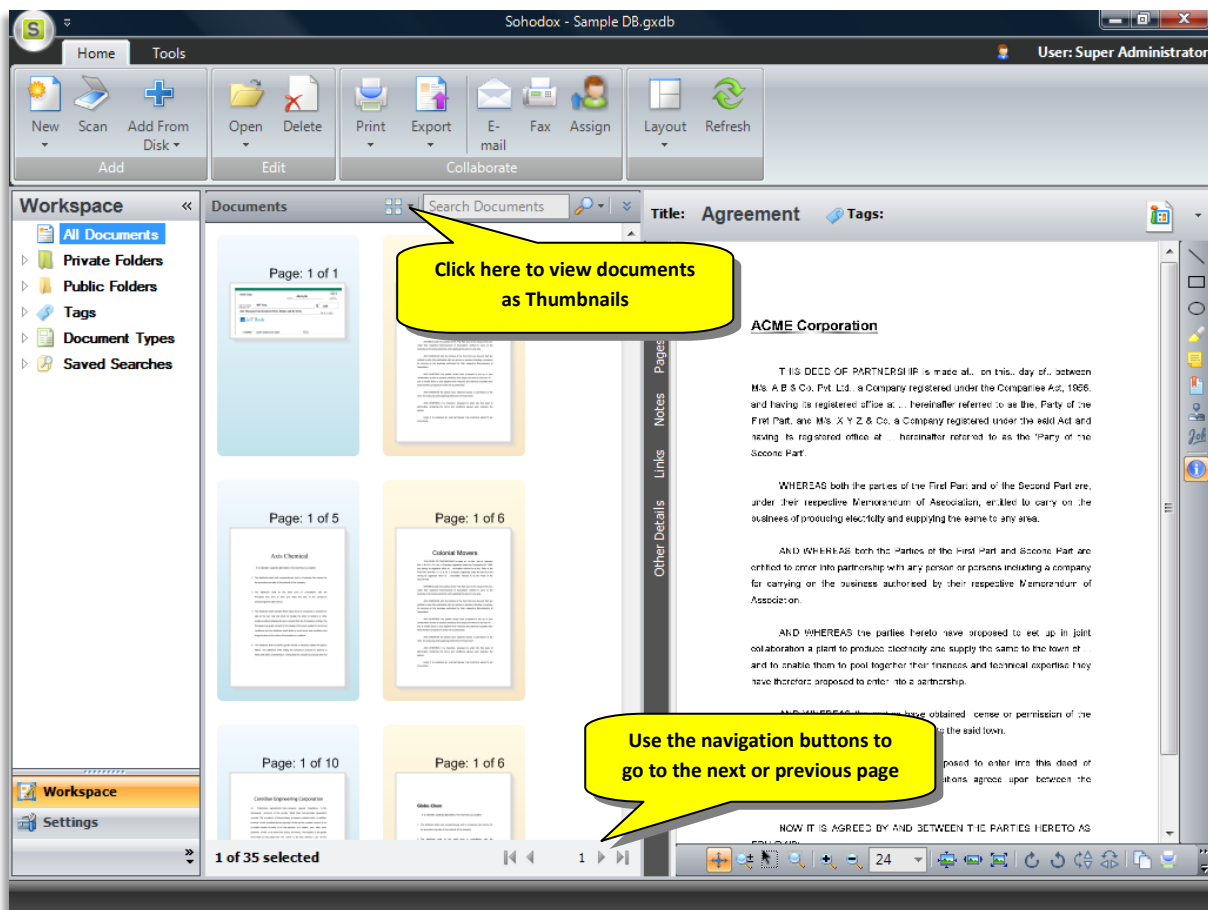
Document Details pane: Details of the document selected in the List View pane are displayed in the Details pane. You can also double-click any document in the List View pane, to open it in a separate window called the Document Details window.
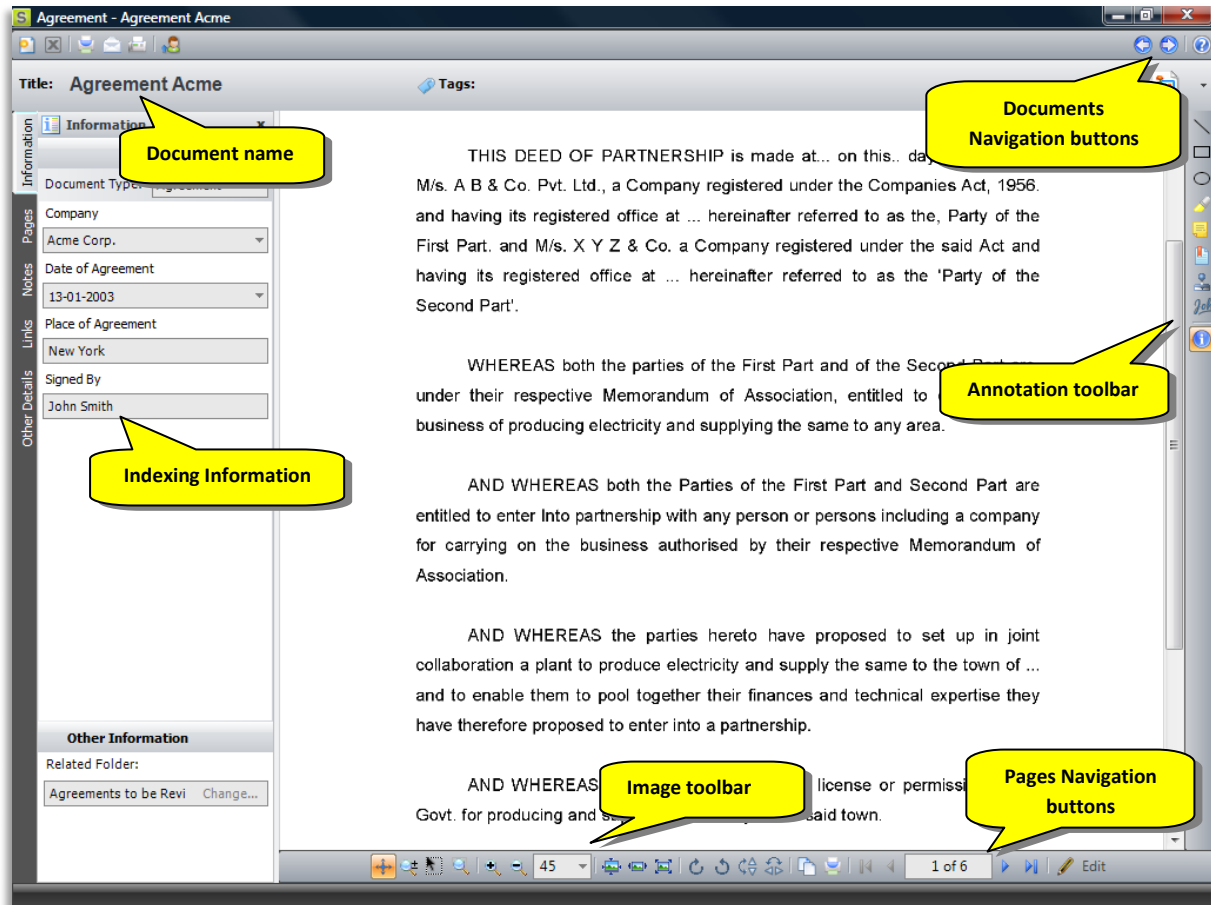
The Details window has the actions toolbar on top, towards the right is the Annotation toolbar and at the bottom is the Image toolbar. The document title is displayed in the Title box. Modify the text in this box, to change the document title. Multiple tags can be added to a document by typing them into the Tags box (separate each tag with a comma). You can also remove existing tags using this box. Use the Navigation buttons on the top right corner of the Details window to go the next or previous document. Use the Navigation button on the Image toolbar to navigate between the pages of the document.

On the left side of the Document Details window there are tabs, they are Information, Pages, Notes, Previous Versions, Event Log, Links and Other Details.

Information: The Information pane displays the Document Type of the document as well as the indexing information entered for the document. You can add or modify the indexing information from this pane.

Related Folder: If the document is stored in a folder, then the name of that folder is displayed in this box. You can also change the document's folder using this box.

Pages: The Pages tab displays all the pages of the document as thumbnails. The Pages panel also displays any Bookmarks created in the document. Thumbnails for non-image file types will not be displayed.

Notes: The Notes tab displays the notes or comments entered by users, regarding the document.

Links: The Links tab displays the documents or stacks that are linked to the document. You can also link the document to another document or stack from this pane.

Other Details: The Other Details tab displays additional information about the document

The simplest way of adding a document to Sohodox is by dragging and dropping the document on the All Documents node. Documents can also be dragged and dropped onto Public or Private Folders, on Tags and on Document Types. You can also drag text from any source e.g. MS Word, PDF, Web page or from your email and drop it in Sohodox to automatically save it as a new file. Documents can also be added by using options like the Find and Add and Scan option. If you have an existing Folder structure that you use to manage your documents, you can use the Add Folders from disk option to import the folder structure along with documents to Sohodox. You can also import documents along with its indexing information from a CSV file.

Document Actions: All the actions that are required to work with documents are available on the *Home* tab or on the right click. These are some of the actions that are available from the *Home* tab.

Email: Select the document(s) and click the Email button on the Home tab or right click document(s) in the List View pane and select the E-mail option to mail documents.

Fax: Select the document and click the Fax button on the Home tab. Documents can also be faxed by right clicking the document.

Print: Select the document(s) and click the Print button on the Home tab or right click document(s) in the List View pane and select the Print option to print documents.

Assign: Right click a document and click the Assign button to assign documents to other Sohodox Users.

Annotation: Use the Annotation toolbar to annotate documents. You can mark, highlight and insert stamps or signatures on a document. Please note you will be able to annotate a PDF document only if they are displayed in the built-in PDF viewer. You can choose the built-in viewer to display PDF documents from the Options window.

Image Editor Window: The Image Editor Window allows you to modify the displayed files and save it back to the Sohodox DB. Using the Image Editor window you can alter, resize, crop and rotate a document. You can open a document (for editing) in the Image Editor window by clicking the Edit button on the Image toolbar.

That's it!

You are now ready to use Sohodox.