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## Easy Data Access

5988 Mid Rivers Mall Drive  
St. Charles, MO 63304

Web Site: <http://www.Docsvault.com>  
E-mail: [Support@edaUSA.com](mailto:Support@edaUSA.com)

# Table of Contents

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<b>Welcome .....</b>	<b>2</b>
<b>Introduction .....</b>	<b>3</b>
<i>Main Features .....</i>	3
<i>Specification .....</i>	5
<b>Installing Docsvault Professional .....</b>	<b>6</b>
<b>Getting Started .....</b>	<b>9</b>
<i>Launching and Registering Docsvault .....</i>	9
<i>Introduction to Docsvault Explorer .....</i>	11
<i>Creating Cabinets and Folders .....</i>	13
<i>Importing Digital Documents .....</i>	15
<i>Scanning in to Docsvault .....</i>	16
<i>Creating PDFs with PDF Creator .....</i>	18
<i>Exporting to Folder .....</i>	20
<i>Exporting as Email Attachment .....</i>	21
<i>Exporting to CD/DVD .....</i>	22
<i>Searching Documents .....</i>	23
<i>Deleting &amp; Recovering Documents .....</i>	24
<i>Archiving Entire Repository .....</i>	25
<i>Backup Entire Document Repository .....</i>	27
<i>Restoring the Document Repository .....</i>	29
<i>Setting and Viewing Task .....</i>	31
<i>Changing Skin .....</i>	32

# *Welcome*

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## **Thank you for selecting Docsvault Professional Edition**

**Easy Data Access** offers you a powerful and user-friendly document management software. Perfect for the individual user, Docsvault is loaded with innovative features like:

- Incredibly Easy-to-use interface
- Customizable file and document organization
- Encrypted document security
- Integrated scanning support
- Integration into Microsoft Office
- Built-in PDF creator
- Complete data backup solution

**Welcome to Docsvault!**

**Docsvault Professional v1.3 Quick Start Guide**

**Author: Easy Data Access**

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# Introduction

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## Main Features

### 1. Easy to Use Interface

- Docsvault has a look and feel similar to Windows Explorer. Its drag-and-drop functionality is virtually identical to that of Windows Explorer, making Docsvault a program you will be comfortable with immediately and with little effort
- You can drag-and-drop files and folders from within the application or from any readily-accessible external source, making importing files incredibly simple
- Docsvault has a simple Cabinet and Folder type filing structure. This facilitates the organization of your documents in a way that suits you best
- Files and folders can be dragged and dropped within Docsvault, as well as between Docsvault and locations in your local computer
- Docsvault can also help prevent costly unintentional deletions through its built-in Recycle Bin, allowing you to recover accidentally deleted files and folders

### 2. Manage All Types of Files

- Docsvault can manage both paper files and computer generated files in an efficient manner
- Scan in your hard documents, create PDFs and store them in to Docsvault
- Documents stored in Docsvault can also be exported to CD/DVD or any other external folder in a local or network drive

### 3. Document Security

- Secure all the important documents in *Safe Docs* cabinet within *Safevault* ensuring the best available protection
- *Safevault* uses 128 bits strong encryption methods to ensure absolute safety of your information
- It is impossible to break into the *Safevault* without the proper password. Once the *Safevault* is locked, it is practically not possible to break into it, not even by us
- Use the password recovery features like "Secret Question and Answer" and "Password Recovery Disk" in case you forget the master password to the *Safevault*
- Secure all your valuable paper documents by scanning them directly into the *Safevault* or import important files into the *Safevault*

### 4. Microsoft Office Integration

- Docsvault seamlessly integrates itself into Microsoft Office applications such as Word, Excel, Outlook, and PowerPoint
- Save your files from the File menu of any of these MS Office applications directly into Docsvault

### 5. Find Documents Quickly

- All text based files imported or created in Docsvault are indexed by text, allowing you to search documents by text within the documents themselves
- Apart from searching by the usual criteria like file name, description, size, and creation date, you can also search for files and documents by the custom profiles, properties, and notes that you have created. Document searching and retrieval has never been this effective
- Our unique *Save Search* feature allows you to save frequently used search parameters, saving you even more time when it comes to retrieving your documents

### 6. Effortless Document Backup

- Backup your documents effortlessly with just a few clicks of your mouse.
- Directly backup to CD or DVD media. Docsvault also allows users to change their preferences to allow for direct burning. Simply right click and select *Burn*, and Docsvault will immediately begin the burning process.
- In case of OS or hardware crash, Docsvault allows you to restore documents with a few clicks and be up and running in no time.
- The structure of your filing is completely retained in your backup, even if you don't have Docsvault.

### 7. Manage Tasks Efficiently

- Never miss an important task again with Docsvault's built-in task manager.
- Set reminders for yourself that will popup at specified times, whether it be once or repeated with daily, weekly, monthly, or yearly intervals.
- Task filing – once tasks are marked as done, old tasks can be archived under 'filed tasks'.

## 8. Integrated Scanning Support

- Paper documents can be seamlessly scanned and turned into digital files through Docsvault's built-in scanner interface and then saved directly in any desired Cabinet or Folder. This incredibly simple interface will change the way you view file scanning.
- You can save your scanned documents as multi-page PDF or TIFF files, along with various other popular image formats
- Docsvault scanner interface works with all TWAIN and WIA compliant scanners

## 9. Password and Information Manager

- Store and manage all of your passwords in the ultra-secure *Safe Info* cabinet in the Safevault, which also utilizes our solid 128-bit encryption
- You can save all of your important information regarding banks, credit cards, email accounts, and other valuable information with worry-free confidence

## 10. Profile Documents

- Profiles are custom descriptive classes that can be created and assigned to any file in Docsvault
- Each property has the ability to have a unique name, description, and data type (text, numeric, date)
- Once properties are created, commonly used properties can be grouped into profiles
- Once created, these profiles can be assigned to individual files in Docsvault
- Individual properties within each profile can be edited, added or removed, allowing full customization of each profile

## 11. Audit Trail

- This feature provides a logbook of events and changes that have occurred to your documents and settings. It keeps a track of changes to specific files, by filename, event date & time, event type, and file path. It even tracks changes made in profiles.
- Audit trails can be turned on or off for any file
- Audit settings can be set on cabinets and folders so that the same audit setting is automatically assigned to files imported or created in Docsvault

## 12. PDF Creator

- Create PDF files of any document instantly by issuing *Print* command from the *File* menu of any application.
- Instead of physical printer, the document is redirected to Docsvault's "PDF printer" to be printed as PDF file

## Specification

The following are the minimum and recommended specifications to run **Docsvault Professional**:


<b>Requisite</b>	<b>Required Minimum</b>	<b>Recommended Minimum</b>
Processor	Pentium 500Mhz	Pentium III
Memory	128 MB RAM	256 MB RAM
Graphics Display Resolution	800*600	1024*768
Operating system	Win 2k	Win 2k, Win XP
.NET Framework	Version 1.1.4322	Version 1.1.4322

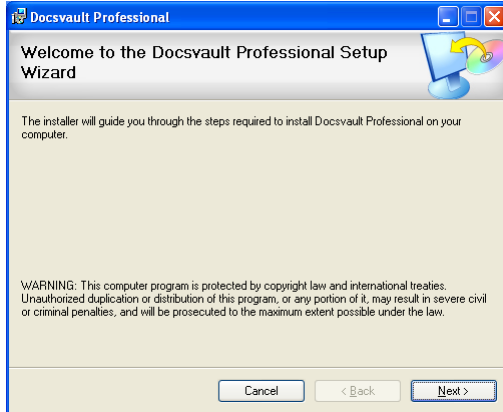
**Note: The Microsoft .Net Framework is available for free from their download center website, "<http://www.microsoft.com/downloads/>". Once on their website, look for the ".NET Framework Version 1.1 Redistributable Package"**

# Installing Docsvault Professional


This section describes how to install Docsvault Professional Edition on your computer running Microsoft Windows 2000 or higher. To install Docsvault Professional properly, you must have administrative rights.

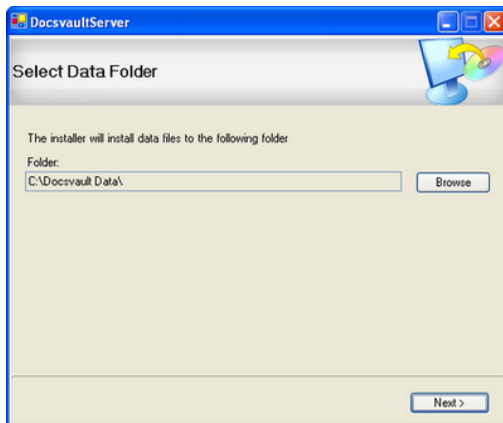
## Step 1 - Initiate Installation Wizard

Insert the CD in your CD/DVD Drive. After a short moment, the **Installation Wizard**'s welcome menu should automatically appear. Click on  to view the '**License Agreement**' page.



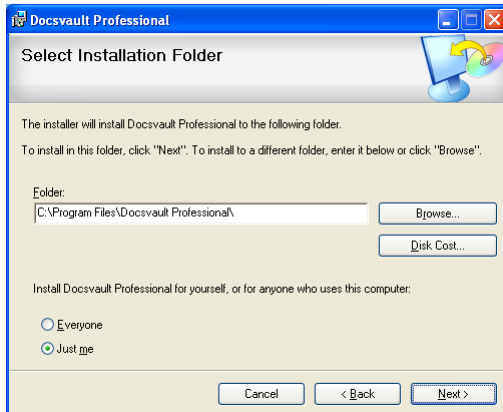
## Step 2 - License Agreement

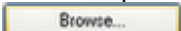
Shown below is the '**License Agreement**' page. Read the License Agreement carefully. If you agree with it, click on the *I Agree* radio button and click .





## Step 3 - Select Installation Folder

Shown below is the '**Select Installation Folder**' page.



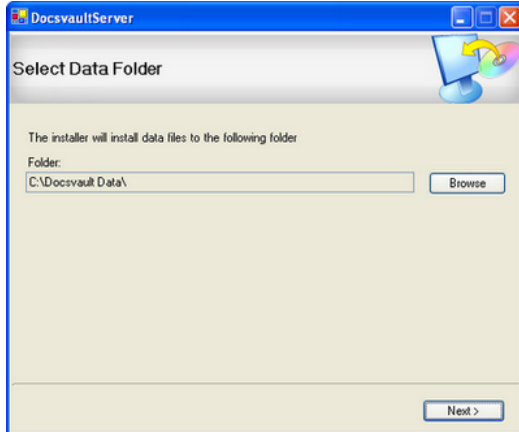
- A default path for installation is automatically chosen. You can select a different location by clicking on .

- Clicking  gives you statistics of the total disk space available in the local drive and the required space by Docsvault. Accordingly, you can decide the appropriate drive for the installation of Docsvault.
- At the bottom you will find 2 radio buttons:
  - Select *Everyone* if you want to install the software for all Windows users
  - Select *Just me* if you want to install the software only for you

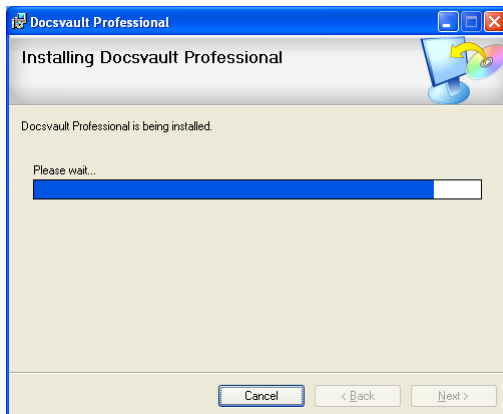
Click on  to go to the '**Confirm Installation**' page.

#### Step 4 - Start Installation

**Confirm Installation** page is confirmation before you start installing Docsvault Professional. In case you want to change the installation location, you can go back and revise the destination.




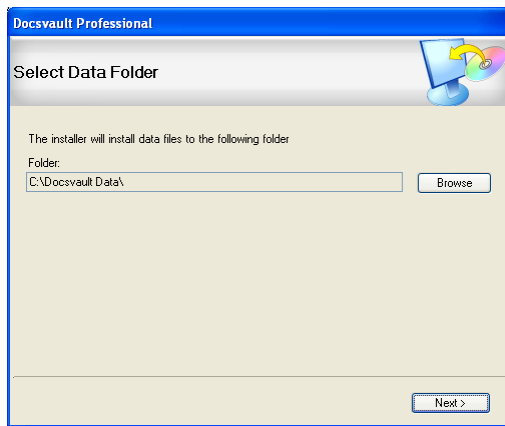
If you are sure about installing Docsvault, click  to start the installation process.




#### Step 5 - Select Data Folder


During the installation procedure, you will be asked to select a destination folder. **Docsvault Data** is the default folder where Docsvault will save your documents. By default, Docsvault selects the **C: Drive**.

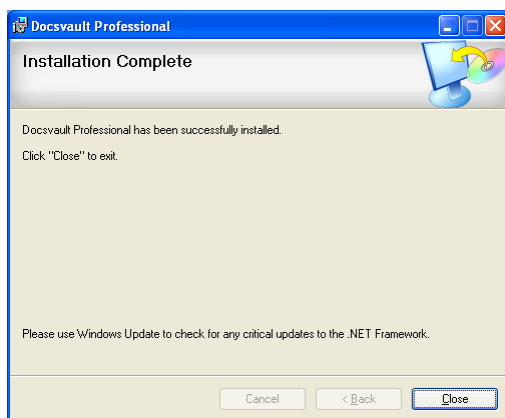
You can select a different path by clicking on .



Click on  when you are done with choosing the *Docsvault Data* path.

## Step 6 - Close Installation Wizard

On completion click .



You are now ready to use Docsvault Professional Edition!

# Getting Started

## Launching and Registering Docsvault

Before learning about all of Docsvault's features in detail, you need to get introduced to the Docsvault user interface. The first and foremost thing is to get the Docsvault Professional interface on the screen. The next topic will cover several ways of launching the Docsvault application. You will also be introduced to Docsvault's main window. After that, you will learn the basic operations like how to create cabinets and folders, importing-exporting files, searching documents, etc.

### Launching Docsvault Professional

You can launch the Docsvault application in one of the following ways:

- **Using Windows Start menu:** Click on *Start >> Programs >> Docsvault Professional*

Or

- **Using Desktop Icon:** Double click on 'Docsvault Professional' icon  on the Desktop.

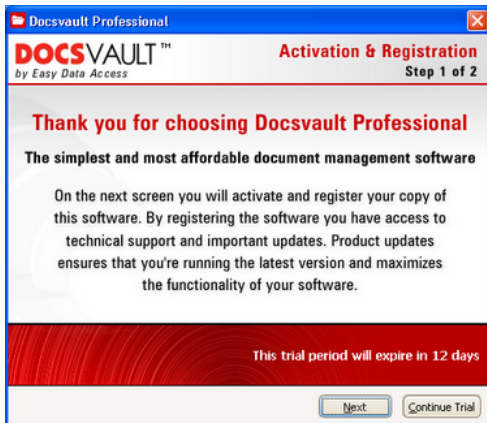
Or

- **Using System Tray Icon:** By default Docsvault Professional will automatically start up in the system tray when Windows starts up. You can display the main window by double clicking on this system tray icon shown below.



### Registering Docsvault

1. The first time you launch Docsvault, you will be presented with a registration form as shown below:




2. Click on  to view the next page of the registration form.



Enter the 25 character *Activation Key* provided with the retail box you have purchased. If you purchased Docsvault online, we will send you an email with the *Activation Key*.

Provide your first name, last name, country of residence, profession and your email id.

Read the **License Terms** by clicking on the blue hyperlink and, if you agree with it, check the adjacent box.

Now, log on to internet and click on . This will activate your copy of Docsvault Professional edition by registering it in our server.

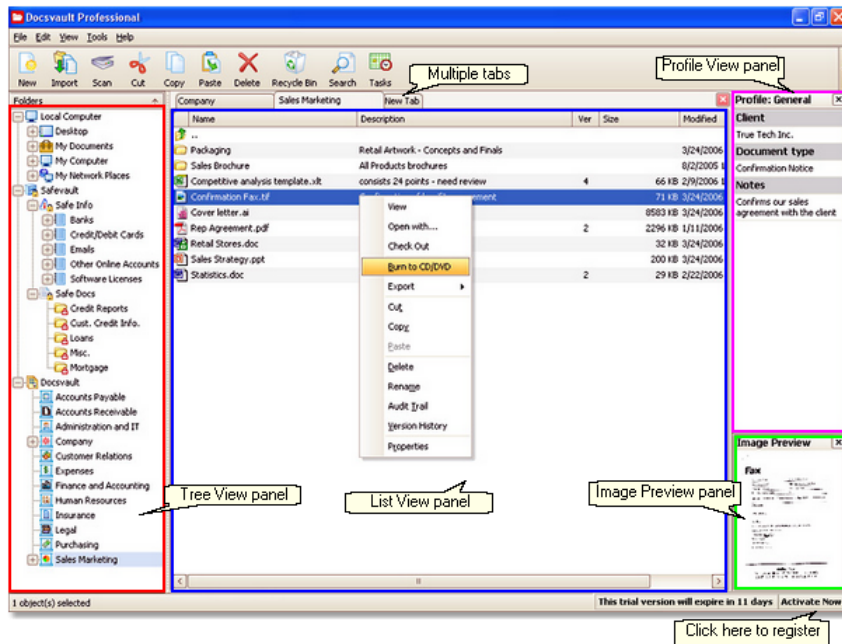
## Introduction to Docsvault Explorer

The look and functionality of Docsvault is very similar to Windows Explorer. It presents a hierarchical structure of cabinets, folders, and files. Apart from that, you can also access the files, folders, and drives on your local computer like you do in Windows Explorer. You can also view *My Network Places*, which lists other computers that are connected to your local area network (LAN). You do not need to quit Docsvault in the event that you want to explore files and folders outside Docsvault. Docsvault also features simple drag-and-drop functionality for copying, moving, importing, and exporting files and folders.

The Docsvault interface also provides multiple tabs so you can search and browse different files, folders, cabinets, and drives at the same time. The multiple tabs also work as a container for **Search** results and **Task** manager

Deleted files from Docsvault are placed in Docsvault's own *Recycle Bin*. You can restore these files anytime, as long as they are not removed from the *Recycle Bin*.

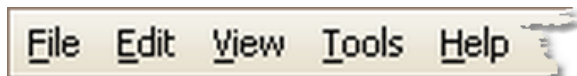
Shown below is the Docsvault Explorer:



Docsvault Explorer

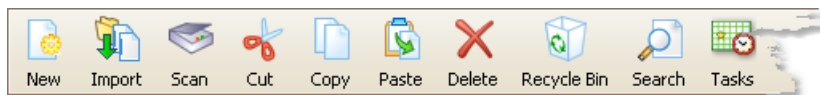
Let us get familiar with each component of the Docsvault Explorer window.

On the top, is the menu bar.



Menu bar

Just below the menu bar, is the tool bar containing icons of frequently used commands.



Tool bar

Below the tool bar are 4 panels (enclosed in 4 different colored rectangles for distinction) called *Tree view*, *List view*, *Profile view* and *Image preview*

**Tree view panel:** As the name suggests, the contents of 'Tree view panel' are shown in a tree type structure. In the tree there are 3 root nodes or base containers:

- **Local computer:** Allows you to browse and manage all the files and folders in your computer, like you do in Windows Explorer
- **Safevault:** This is a secured container where you can store all the sensitive documents and information in a password protected and encrypted environment.
- **Docsvault:** You can store, organize and manage all the documents in cabinet and folder structure.

**List view panel:** When a cabinet or folder is selected in the Tree view panel, all it's content files and folders

are displayed in a list form in the List view panel.

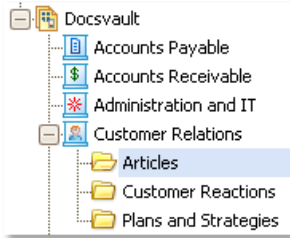
**Profile view panel:** If a file is selected from the List view panel, it's corresponding profile is displayed in the Profile view panel.

**Image preview panel:** You can see a thumbnail of the image file selected from the List view panel.

## Creating Cabinets and Folders

The concept of Cabinets and Folders in Docsvault is similar to the traditional use of physical cabinets in your office. This facilitates to keep your document separate, safe and easily searchable. We believe using such terms maintain similarity between the digital and physical necessity for document management.

In the hierarchy, cabinets exist immediately under the *Docsvault* node displayed in the Tree view panel of Docsvault Explorer. Folders and sub folders can be created within each cabinet. Documents can also be stored directly into the cabinet without creating any folder.



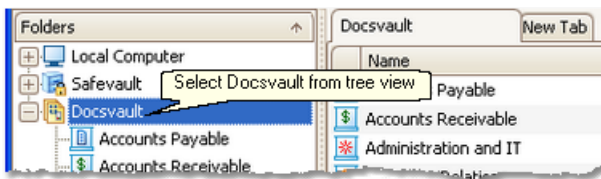
### Note:

- Nested cabinets are not allowed. You can not create a cabinet within another cabinet.
- Folders can not be created right away under *Docsvault* node. They have to exist only inside a cabinet.

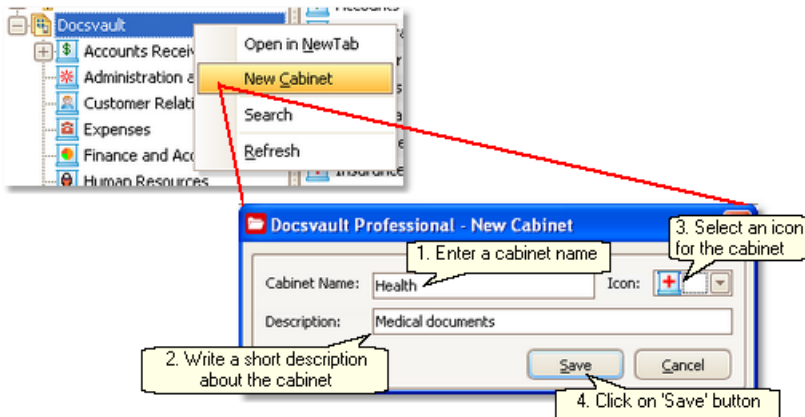
Let us begin by demonstrating the creation of cabinets and folders.


### Creating a New Cabinet

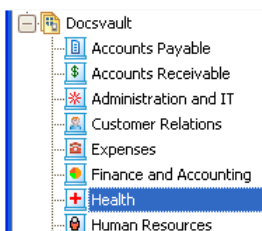
1. Select *Docsvault* from the tree view panel:



2. Right click on *Docsvault* to bring up the popup menu. From the popup menu, click on **New Cabinet** to display the **New Cabinet** dialog box as shown in the figure below:

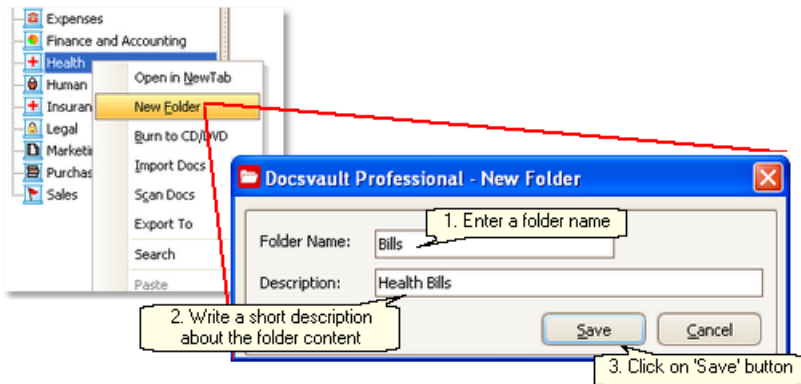


After you have provided cabinet name and description, and selected an icon click on . You will find the cabinet, *Health* gets added to the tree.

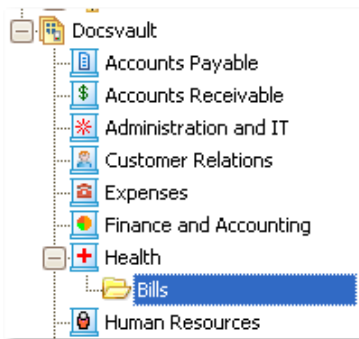


## Creating a New Folder

1. Select the *Health* cabinet you just created from the tree view panel.
2. Right click over the *Health* cabinet to display the popup menu. From the popup menu click on **New Folder** to bring up the '**New Folder**' dialog box as shown in the figure below and follow the three step process shown:



A new folder, *Bills*, gets created as shown in the figure below:




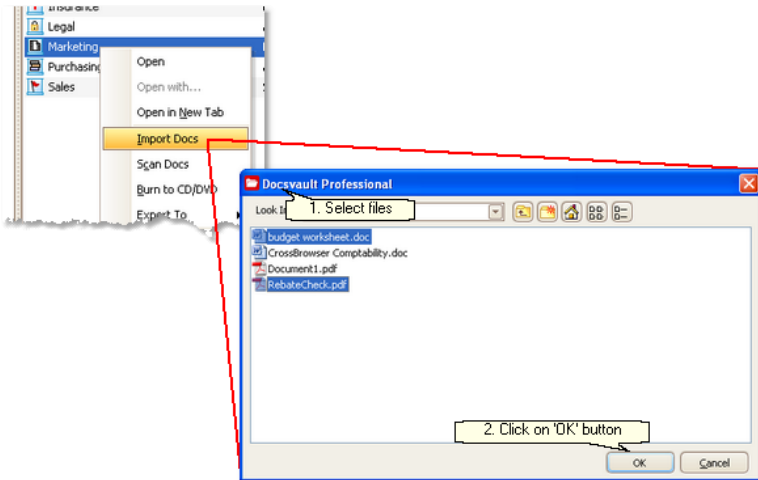
Likewise, you can also create sub-folders within this folder.


## Importing Digital Documents

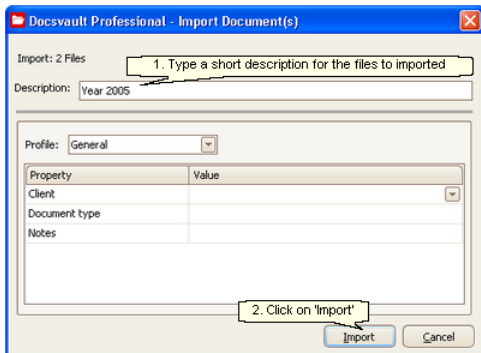
Now that you are done with creating cabinets and folders, let's demonstrate how to import documents into a cabinet or folder.

1. Select a cabinet or folder in which you want to store the imported documents from the tree view panel of Docsvault explorer
2. Select and right click on a cabinet or folder to display the the popup menu. From the popup menu, click on **Import Docs** to display the "Windows desktop navigation" dialog box as shown in the figure below:

Select files and click on . You can select multiple files by holding 'Ctrl' key from the keyboard and simultaneously clicking on the files.



4. Now you can see the **Profile** dialog box in which you can write a short description about the files to be imported. Click on  to begin importing your files or documents.



5. You have now successfully imported documents into Docsvault!

## Scanning in to Docsvault

Get paper documents converted to digital ones in no time with Docsvault's integrated scanner interface. This scanner interface is for those users who want to avoid the complexities of conventional scanner interface and get the work done quickly. Docsvault automatically detects the scanner installed on your computer. Moreover, if there are more than one scanner installed on your computer you have the liberty to choose one of your choice.

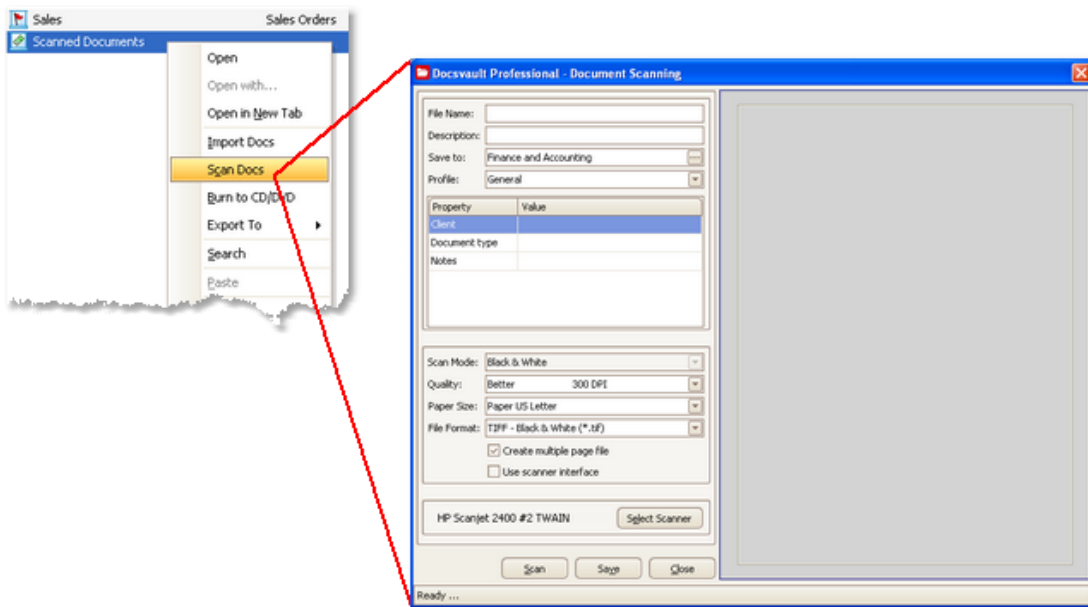
With Docsvault, scanned documents can be saved in one of the following formats:

i) TIFF (Uncompress), ii) TIFF Black & White, iii) PDF, iv) JPG, v) BMP, vi) PNG

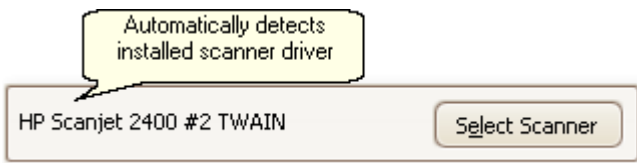
The prime feature of Docsvault is that multiple-page documents can be scanned and packed in a single file in PDF or TIFF format


Now we will demonstrate how to scan paper documents and directly store them in Docsvault through Docsvault's built-in scanning interface.

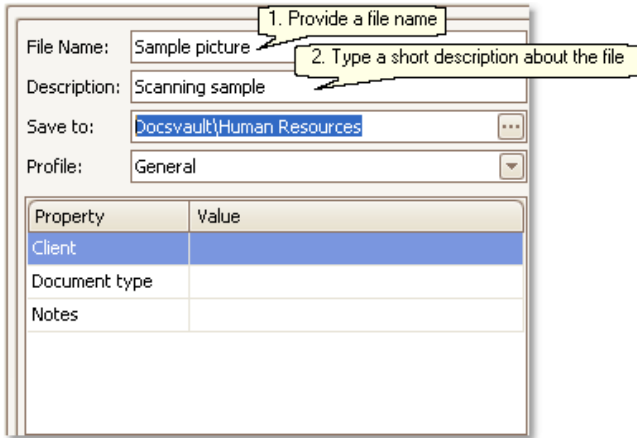
1. Select a cabinet or folder from the Docsvault explorer and right click over it.
2. From the popup menu, click on **Scan Docs** to display the **Docsvault Scanning** dialog box.



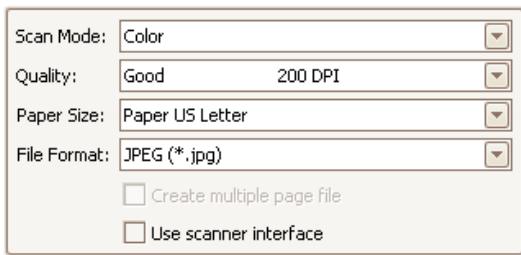
Docsvault will automatically detect and display the installed scanner driver.




3. Enter a file name and a short description about the file to be scanned. The 'Save to' field shows the location where the file will be saved. Click on  button to change the location. You can also assign a pre-defined profile from the *Profile* drop down.

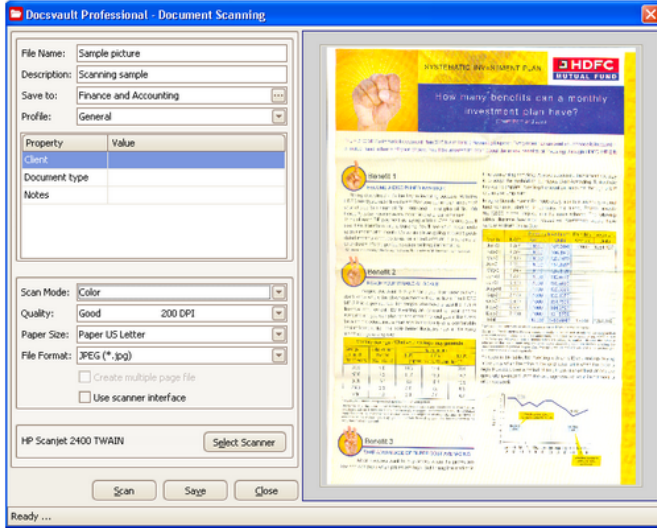



4. Choose a mode to scan in under 'Scan Mode' and a file format under 'File Format.' You may also choose the image quality and the paper size from the respective drop down menus. We have chosen *Color* from the 'Scan Mode' drop down list and selected a *JPEG File Format*:



6. Now, scan in the file by clicking on the .

7. When the scanning is over, you get a preview of the scanned document in the preview window:

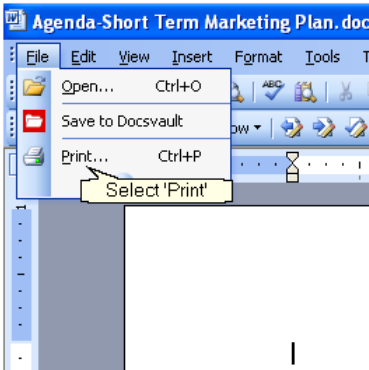


8. If you are satisfied with the image, click on the  to save the scanned document.

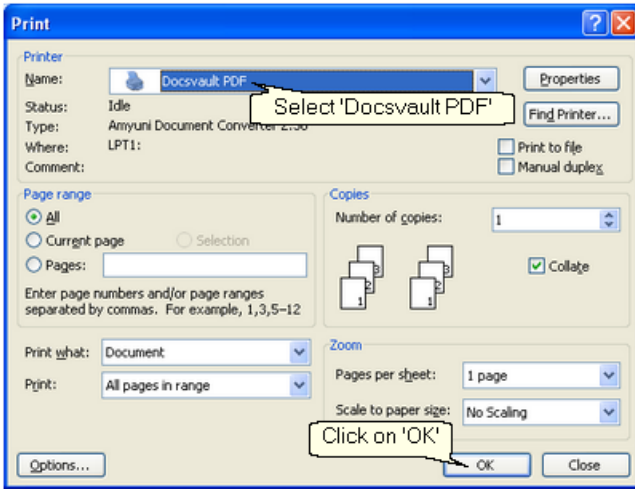
## Creating PDFs with PDF Creator


With Docsvault, you can create PDF files from any application that has printing capabilities. As an example, we will demonstrate the conversion of an MS Word document into a PDF. Make sure that the Docsvault application is running.

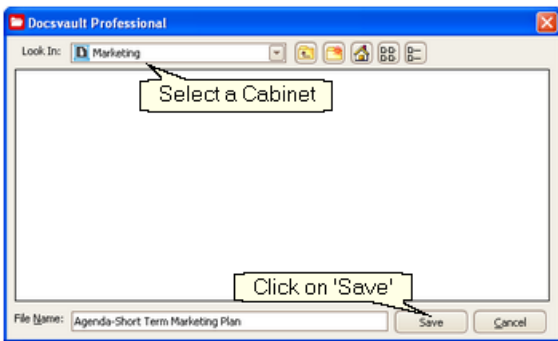
1. Open an MS Word document and click on **File >> Print** to display the standard **'Print'** dialog box.




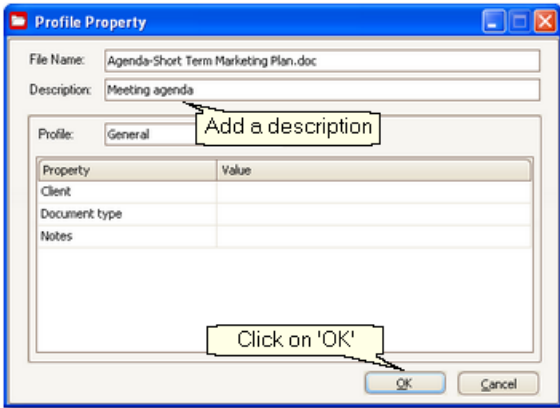
2. Select **Docsvault PDF** from the **'Printer'** drop down list and click the  button.



3. Docsvault navigation dialog box comes up. Select a cabinet into which you want to save the PDF file and click on .



4. This will display the **'Profile'** dialog box. Add a description and click on .

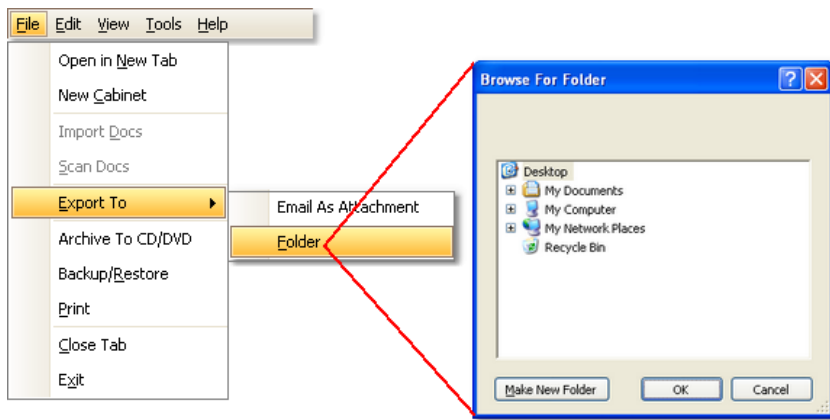


The document is printed into a PDF file which then gets stored in the selected location

## Exporting to Folder

You can export documents, folders, or entire cabinets to any location on your computer.

1. Select the documents, folders or cabinets to be exported from the list or tree view panel of Docsvault explorer.
2. From the menu click on **File >> Export To >> Folder** to display the '**Browse for Folder**' dialog box.



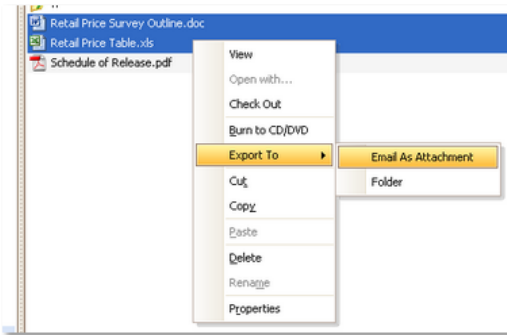
3. Select a location from the '**Browse for Folder**' dialog box, then click on the **OK** button to begin exporting.
4. All specified files have now been exported to the destination, retaining the exact hierarchical folder structure as in Docsvault.

**Note:** Cabinets are exported to the destination as folders.

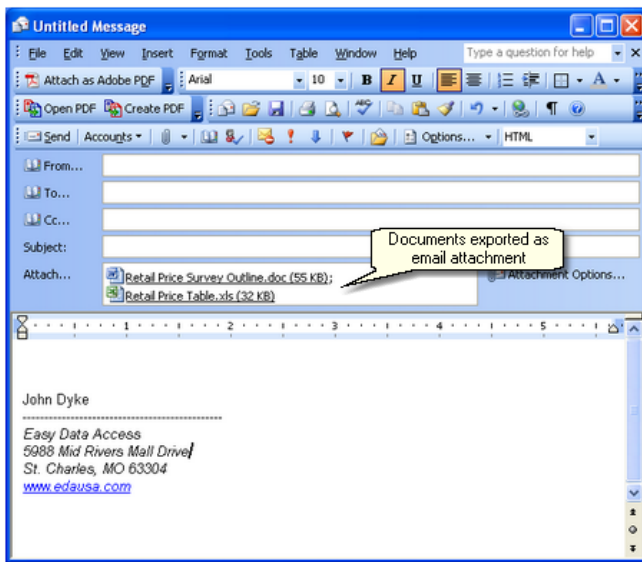
## Exporting as Email Attachment

You can export one or more documents as email attachment to the default email client program with just a couple of clicks. The email client program can be Microsoft Outlook or Outlook Express.

1. Select one or more documents from the Docsvault explorer and right click over the selection.
2. From the pop up menu that comes up, click on **Export To >> Email As Attachment**.




3. Email client opens the compose window with the selected document as attachment

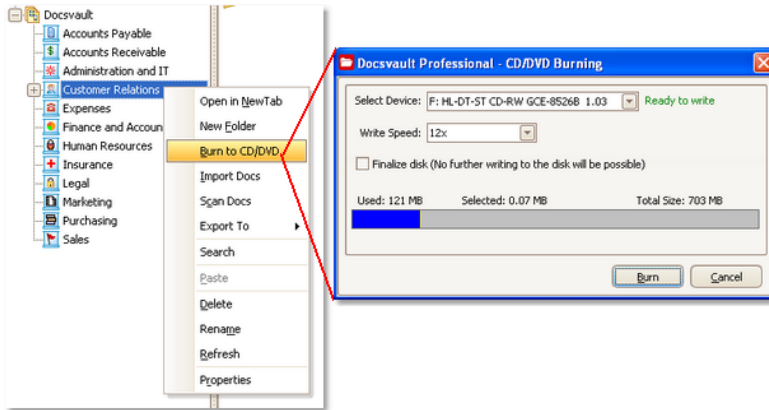


## Exporting to CD/DVD

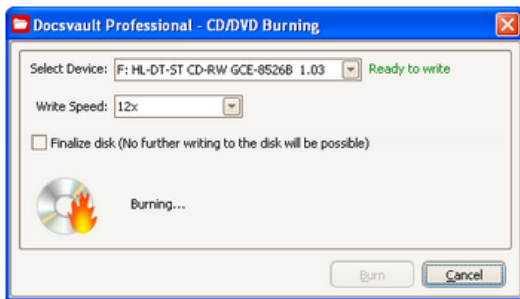
Use the "Burn to CD/DVD" option to export only selected files, folders and cabinets to CD/DVD. This option is allowed for *Docsvault* and *Safe Docs* contents. Contents of *Safe Info* cannot be exported with this option.


1. Select cabinets, files and folders to be exported to CD or DVD.
2. Right click on the selection and from the pop up menu click on **Burn to CD/DVD** to display 'CD/DVD Burning' dialog box.

Your CD/DVD writing drive will be automatically detected by Docsvault. Select a writing speed. Now click on .



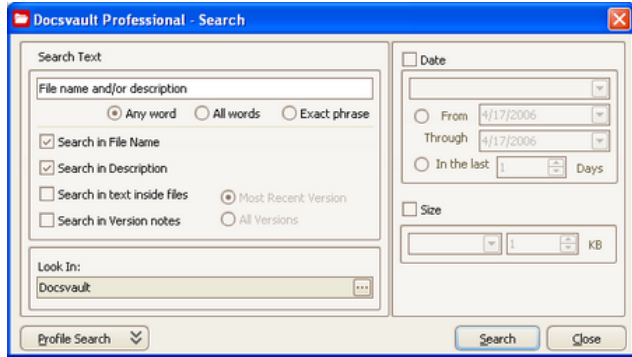
3. This starts the burn process.





4. When the burning process is finishes click on  to close the dialog box.

## Searching Documents



You can search documents that are stored in the Docsvault using the *Search* interface, shown below.



### Searching documents by Name or Description

1. Select a cabinet or folder in which you want to search from the tree view or list view panel of Docsvault explorer.
2. Click on the  icon from toolbar. This will bring up the 'Search' dialog box.
3. Enter the name and the description of the document.
4. Click on .
5. The search results will be shown in a new tab in Docsvault's main window.


### Searching a document by word or phrase inside a file

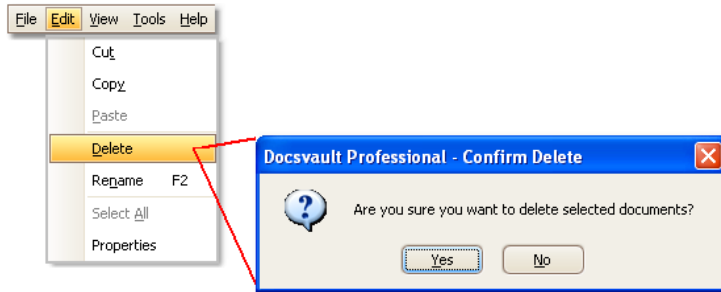
1. Select a cabinet or folder in which you want to search from the tree view or list view panel of Docsvault explorer.
2. Enter a word or a phrase from the content of the file.
3. Click on  **Search in text inside files** check box. Deselect other check boxes.
4. Click on .
5. The search results will be shown in a new tab in Docsvault's main window.

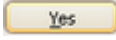
## Deleting & Recovering Documents

When you delete a document, folder or cabinet it is relocated to Docsvault's *Recycle Bin*. You can recover them anytime as long as they exist in *Recycle Bin*.

### Deleting Documents

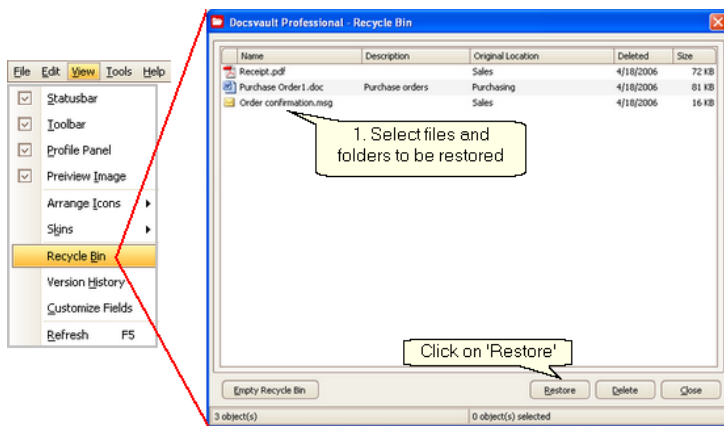
1. Select the documents to be deleted.
2. From the main menu select **Edit >> Delete** or click on  icon from the toolbar. This will popup a message box as shown below:




3. Click on  . This will delete the selected files.

### Restoring Deleted Documents

1. From the main menu select **View >> Recycle Bin** or click on  icon.
2. This will display '**Recycle Bin**' dialog box as shown below.

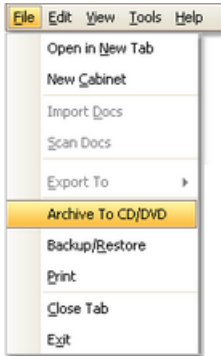


3. Select files and folders to be restored and click on  .

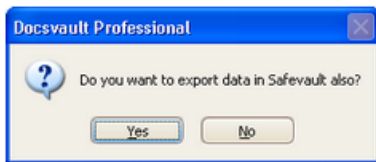
## Archiving Entire Repository



While 'Burn To CD/DVD' option exports only selected cabinets and folders, 'Archive to CD/DVD' exports the entire repository in hierarchical folder structure. This again can be done with just a few clicks as illustrated below:

1. From the menu click on *File >> Archive To CD/DVD*.



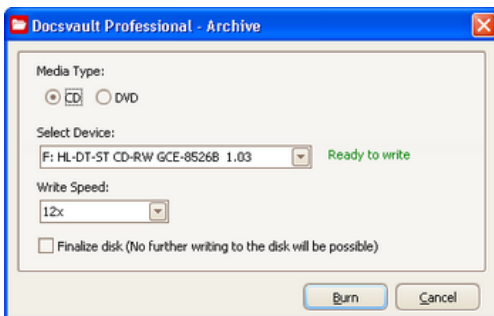
2. This will popup a dialog box. Click on 'Yes' if you want to export contents of Safevault also.



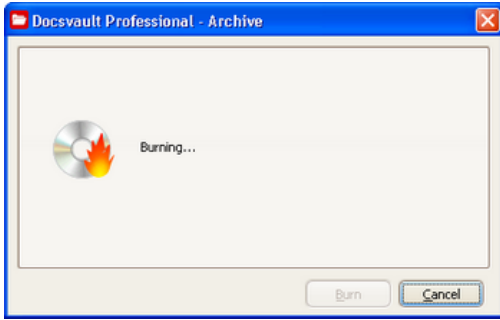
3. A dialog box pops up suggesting you to keep the data in Safevault in a safe place. Click on . Master password form for Safevault comes up. Enter the password and click on .



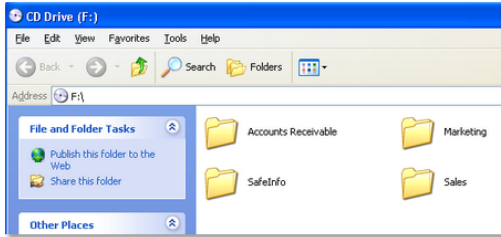
5. This brings up the Archive wizard. Click on 'Burn' to start the burning process.



6. Burning process starts




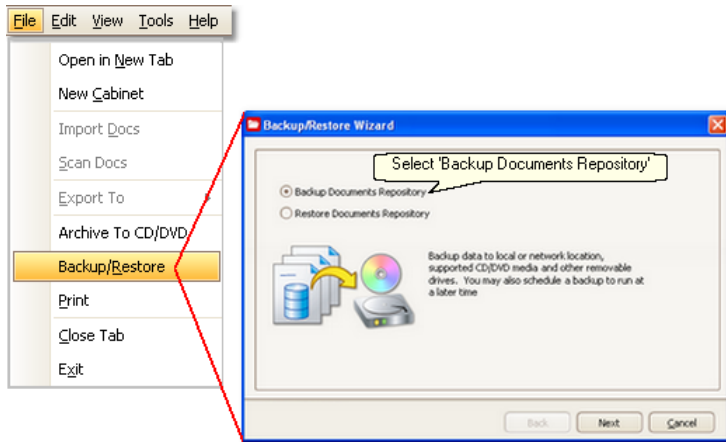
7. When the burning is successfully completed click on
8. Now open the CD to see the exported repository.

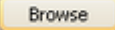



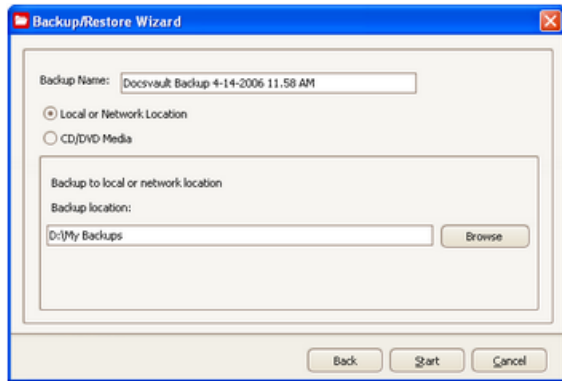
It must be noted that empty cabinets and folders are not exported.

## Backup Entire Document Repository

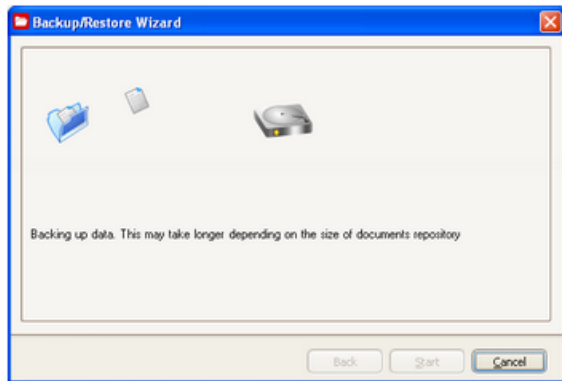
1. From the menu click on **File >> Backup/Restore** to display the '**Backup/Restore**' wizard. By default, the '**Backup Document Repository**' radio button is selected. Click on  to display the next page.




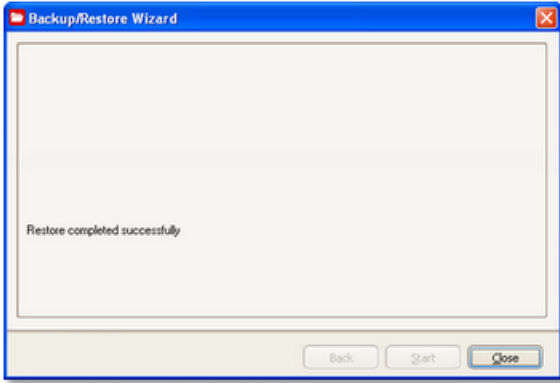
2. Select a location by clicking on the  button, and then click  to start the backup process.



3. Figure below shows the backup process in progress.

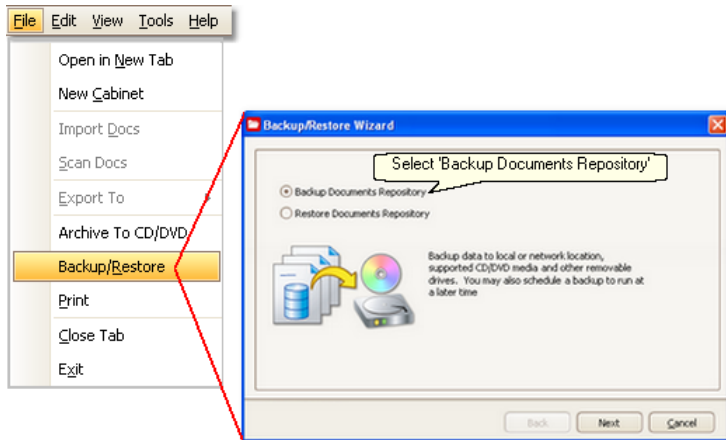


4. On completion, the '**Backup Wizard**' gives a success message. Click on  to close the dialog box.

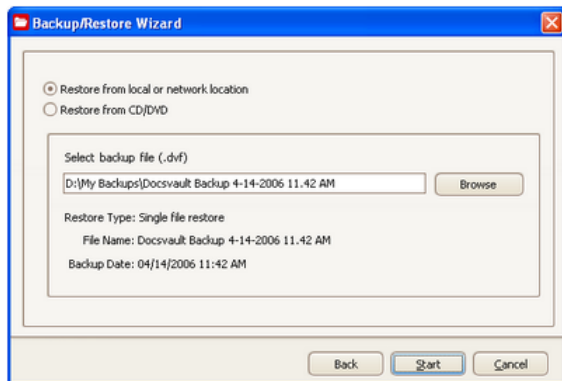


## Restoring the Document Repository

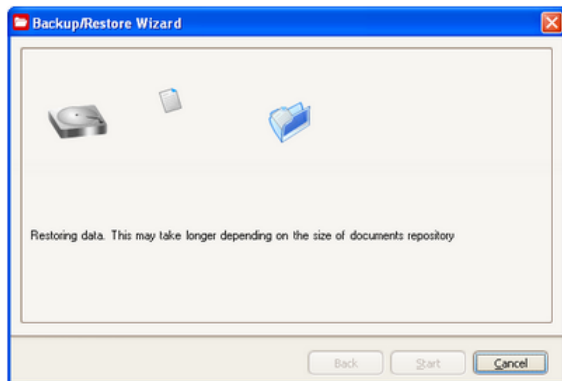
1. From the menu click on **File >> Backup/Restore** to display the '**Backup/Restore**' Wizard. Select the '**Restore Documents Repository**' radio button and click the **Next** button to display the next page.



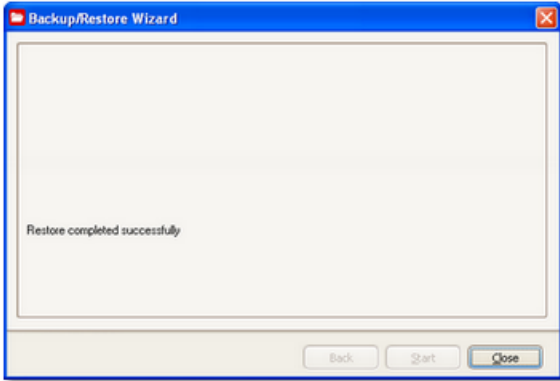
2. Two radio buttons are provided to create backup on local/network location and CD/DVD. We have selected "**Restore from local or network location**" radio button. Find the location where you had stored the backup file by clicking on **Browse**, then click on **Start** to start the restore process.



3. The restore process starts



4. On completion, the '**Restore Wizard**' will give a success message. Click on **Close** to close the dialog box.



5. After the restoration process is over, Docsvault application shuts down so that the changes can be made in the application. You need to restart the application once again.

## Setting and Viewing Task


Docsvault is not only an efficient Document Manager but it also offers many Task Management features:

- Set a reminder that will remind you at the right time about meetings, special occasions, or important days of your life
- You can set priority to your tasks so that high priority tasks are sorted together at the top in the listing and easily viewed
- Documents related to a task can be linked with the latter so that they can be directly opened for viewing from the task window
- File completed tasks so that they can be referred later

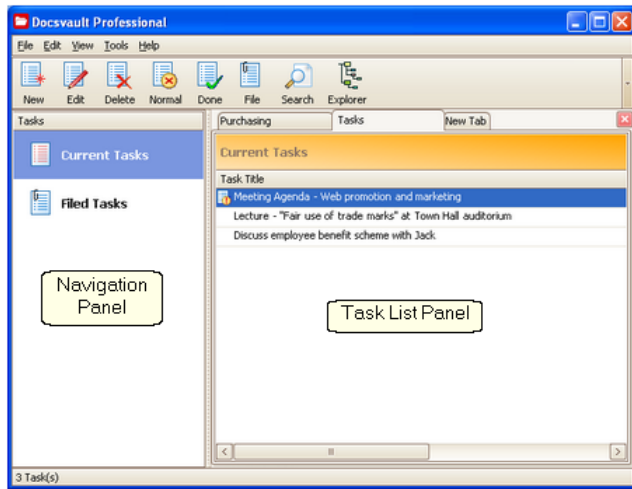
### Opening Task manager window

- From the menu click on **Tools >> Tasks**

Or

- From the toolbar, click on  icon


This will open the Task manager in a new tab as shown below:

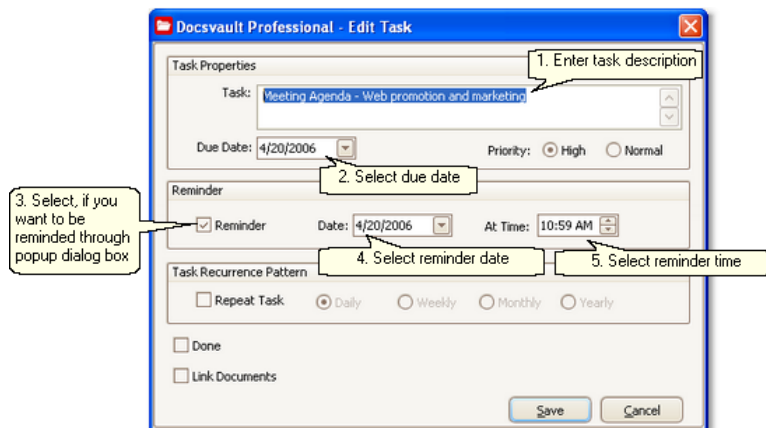



The task manager is split into two panels:

- To the left is 'Task navigation panel' so that you can switch between list of current tasks and filed tasks
- To the right is 'Task list panel' which displays the list of current or filed tasks, whichever is selected.

Let us learn how to add a new task to the task list.

1. Click on the new task icon  from the toolbar to display the **'New Task'** dialog box and follow the instructions given in the figure.

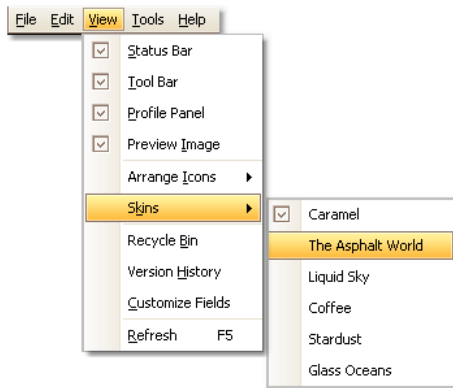


2. Click on  to save the task.

## Changing Skin

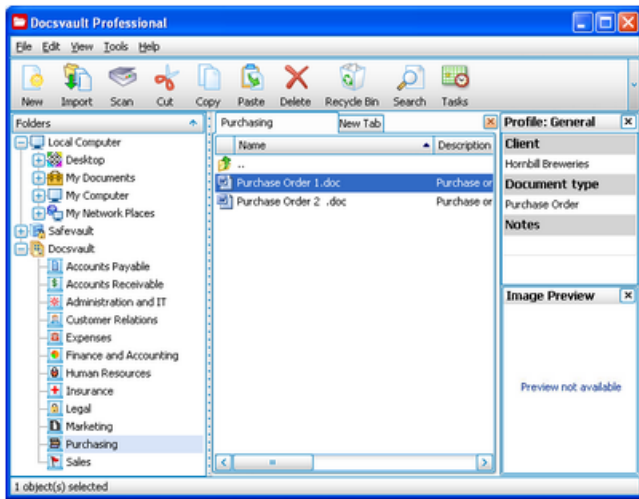
If you want the Docsvault user interface to have a different look, you can do so by changing its skin. There are six different skins to choose from. The default skin is *Caramel*.

1. From the menu, click on **View >> Skins**



You get six different skins to choose from. Default selected skin is *Caramel*

2. Click on the skin of your choice to change the skin



## **Technical Support**

For any product related or general customer service questions that may arise, please use our online Technical Support Forum or contact us by email at: [Support@edaUSA.com](mailto:Support@edaUSA.com)

## **Easy Data Access**

5988 Mid Rivers Mall Drive  
St. Charles, MO 63304

Web Site: <http://www.Docsvault.com>  
E-mail: [Support@edaUSA.com](mailto:Support@edaUSA.com)