

DocPal User Guide

User Guide

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USER GUIDE

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1 Introduction

This document describes how to install, configure and use DocPal.

1.1 Abbreviations

The following acronyms and abbreviations are used throughout this document:

GUI Graphical User Interface

1.2 Conventions

The following fonts are used throughout this document to emphasize different features:

Term	Description	Font
GUI feature	The name or title of any GUI feature such as an input field, combination box, button or panel.	Account name:
Link	An internal link to a different part of this document or an external source	cs@kerrywebdesign.com
Input	A value that you are required to enter or select.	2009-01-09
File and directory names	The name, including path name, of any file or directory	DocPal2_0_x_win32.exe

Table:1: Conventions

1.3 DocPal Support

For customer support issues, report problems, make donations or any other issues with DocPal, please use one of the following links:

Email: cs@kerrywebdesign.com

Website: www.kerrywebdesign.com/Java/DocPal.php

Phone: +66 32 53 66 73

Mobile: +46 70 770 54 87

2 Overview

DocPal provides a Graphical User Interface (GUI) for creating and managing documents created using the OpenOffice 3 Writer application. The benefit of DocPal over simply opening OpenOffice documents directly are:

- ◆ The DocPal Document Manager lets you create OpenOffice Writer documents and automatically populate the document with important core contact details such as the name, address, reference to, date written and subject of the correspondence. This is especially timesaving and less error prone than having to enter details separately every time you create a document.
- ◆ DocPal lets you maintain core contact information separately from creating documents through the Contact Manager. In addition to core contact details, the Contact Manager also lets you record additional useful information about each contact such as email, fax, telephone and other details.
- ◆ DocPal files each document you create using a unique file name. The DocPal Search Manager maps the filename to recognizable document attributes, such as date written and addressee so that you can retrieve documents quickly and easily.
- ◆ The Template Manager lets you record details about each template that you use. There are no limits to the number of templates that you may use. DocPal lets you declare a default template so that all your documents are automatically formatted according to that template. You may easily change your default template or select a different template whenever you create a new document.
- ◆ DocPal is completely stand alone and requires neither a connection to the Internet or complicated database management software to be downloaded to your PC or laptop to work.

3 Installing and Setting Up DocPal

3.1 Installing DocPal

To install DocPal version 2, perform the following steps:

- 1 From the Kerry Web Design website <http://www.kerrywebdesign.com/Java/Download.html> locate the DocPal application and click the **DOWNLOAD** link. The executable installation file DocPal2_0_x_win32.exe will be downloaded to your computer. Note that x refers to the build number of the DocPal version you are downloading.
- 2 Click the executable installation file and follow the steps provided by the SetUp2GO installation wizard.

3.2 Running DocPal for the First Time

After you install DocPal and run it for the first time, the setup panel is displayed as shown in figure 1:

Data Directory:

DocPal will create folders under the directory DocPal in your system dependant root directory. This is where your documents, data files, temporary files and templates are stored. If you want to use an alternative location or root, please select the root from the combination box and specify a directory name in the input field. Note: you may enter a path name consisting of subdirectory names separated by the separators '\'. For example: Documents\MyFiles

C: ▾ DocPal

Date Format:

Select the way you want to enter dates, and the way the date is shown in correspondence and documents you create:

Regional Preference	Data Entry Format	Output in Correspondence
<input checked="" type="radio"/> British	11/03/2009	11th March, 2009
<input type="radio"/> American	03/11/2009	March 11th, 2009
<input type="radio"/> European	2009-03-11	2009-03-11

Save

Figure 1: DocPal Setup Panel

The setup panel lets you:

- ◆ Select a location for your data files
- ◆ Select a regional date preference.

3.2.1 Selecting a Location for your Data Files

This is where you store the OpenOffice Writer documents you create, the OpenOffice Writer templates you use, and the summary files that keep information about your documents, contacts and templates. If you have been using DocPal version 1, you use the setup screen to point to the location of the data files that you have been using with version 1.

You can either accept the folder that DocPal creates for you, or you can specify a different folder. DocPal will create the folder `C:/DocPal` unless you specify something different.

To create a folder for your data files, perform the following procedure:

- 1 Go to the **Data Directory** panel in the **Settings** panel.
- 2 Do you want to accept the default location and folder name of `C:/DocPal` for storing your data files?

Yes: Go to section 3.2.2 Select a Regional Date Preference.

No: Go to step 3.

- 3 From the combination box, either keep the default drive `C:` or select a new drive.
- 4 In the input field next to the drive combination box. Either keep the default folder name `DocPal` or enter the name of the folder that you would prefer instead.

Note: You may enter multiple path names if you wish. For example, to store your data in a location `D:/My Documents/DocPal/data`, you would enter `My Documents/DocPal/data` in the input field.

3.2.2 Select a Regional Date Preference

You can either accept the UK date format or select a different preference more appropriate to your region. If you accept the UK format, you will have to enter all your dates in the format `dd/mm/yyyy`, for example, **09/01/2009**. The printed date format will then appear on reports as **9th January 2009**. The **Date Format** panel in the **Settings** panel shows the alternative formats that you can select, either European format or United States format.

The date formats that are currently available are:

- ◆ UK format: `dd/mm/yyyy`, for example **09/01/2009**
- ◆ European format: `yyyy-mm-dd`, for example **2009-01-09**
- ◆ United States format: `mm/dd/yyyy`, for example **01/09/2009**.

To select a date format, perform the following procedure:

- 1 Go to the **Date Format** panel in the **Settings** panel.
- 2 Select a radio button under the **Region** header for the date format you want to use.

Note: Once you select a date format, you will not be able to a different regional setting at a later date.

Click the **Save** button. Your selected data directory and regional date settings are now saved and DocPal is ready for use.







3.3 Navigating DocPal

When you have setup DocPal with your preferences, you navigate the DocPal GUI by clicking the Manager and Utility buttons in the menu bar as shown in figure 2:



Figure 2: DocPal Menu Bar

The buttons perform the following actions:

Term	Description
	Opens the home page.
	Opens the Document Manager where you can create new documents.
	Opens the Contact Manager. The Contact Manager lets you create, modify or delete contacts.
	Opens the Search Manager where you find and open OpenOffice Writer documents that you have previously written.
	Opens the Template Manager where you manage your OpenOffice templates.
	Info button. Opens the Information Panel. Contains information about DocPal, customer support and end user documentation.


Term	Description
	Close button. Lets you quit DocPal.

Table:2: DocPal Main Menu Buttons

3.4 Mandatory Fields

Some input fields must always have values entered. For example, every document must have a date written, someone or some organization that it is addressed to, and a first line of the address. Fields that must have a value entered are shown with a light red color background, for example:



Figure 3: Mandatory Field

3.5 Default Values

To reduce the possibility of entering incorrect data, some mandatory fields are automatically populated with a correctly formatted value. This value is usually a value that you will probably want to accept. For example, the Date written field of the Document Manager always contains today's date because you are more likely to date your document the same day as you write it. Of course you can edit default values if you need to, for example, to post or pre-date a document.

3.6 Error Handling

If you input erroneous data to a mandatory field, the field turns red and the cursor will remain in the field until you enter the correct information. For example, here is an incorrect date, the 31/02/2009 that has been entered:



Figure 4: Invalid Input

In addition, an error message box is displayed to clarify the error as shown in figure 5:



Figure 5: Error Message

3.7 Resetting Fields

To clear all data entry fields of previous, unwanted or erroneous input, each panel has a **Reset** button. You can use the **Reset** button in the following ways:

- ◆ To clear all input fields. For example, after displaying data about a particular object such as a contact, you may want to enter a new contact. Clicking the **Reset** button sets up the empty input fields you need to enter the new contact details.
- ◆ If you enter erroneous input and then decide that you would rather close DocPal by clicking the **Close** button rather than correcting the error, DocPal will still ask you to correct the errors before continuing. By clicking the **Reset** button before the **Close** button, DocPal clears the error so that you can quit in the normal way.

4 The Document Manager

The Document Manager lets you:

- ◆ Create OpenOffice Writer documents. These can be automatically populated with important core contact details such as the name, address, reference to, date written and subject of the correspondence.
- ◆ You can also create a new contact at the same time you create a new document.
- ◆ You can access full details about your contact such as email, fax phone and other important contact information while you create your document.

4.1 Creating a Document

To create a new OpenOffice Writer document, perform the following steps:

- 1 From the menu bar, select the Document Manager icon. The **Document Manager** panel is opened.
- 2 Does the individual or organization that you are addressing the document to exist in the **Select contact** table?

Yes: From the **Select contact** table, click the row containing the name of the contact to whom you are addressing the document. The contact detail fields are automatically filled in.

Note: If you have previously stored additional information about the contact such as phone, fax or other contact information, you can browse this by clicking the **View Additional Details** button.

Go to step 5.

No: Enter the contact details in the **Organization or person name** fields, the address fields, and the **Reference** field.

Note: You may now store the contact details by clicking the **Save contact** button.

- 3 In the **Subject** field, enter a subject line if required.
- 4 Click the **Open** button. The OpenOffice Writer application is opened and your document opens on your desktop. You can now complete your document by adding the rest of the content.

Note: When you are finished writing your document, use the OpenOffice Writer menu **File > Save** to store your document in your file system. To print your document, use the OpenOffice Writer menu **File > Print**.

5 The Contact Manager

Before you begin writing documents you may wish to store information about the organizations and individuals, that is, contacts, that you eventually address your documents to. Although you can enter contact details when you write a document, you might find it useful and time-saving to have these details available before you start.

Managing contacts means:

- ◆ Creating new contact details. Section 5.1 describes how to enter a new contact.
- ◆ Modify contact details, such as when a contact changes their name, address, telephone number, or other details. Section 5.2 describes how to modify contact details.
- ◆ Delete a contact. Section 5.3 describes how to completely remove a contact from your file system.

5.1 Creating a New Contact

To create a new document, perform the following steps:

- 1 From the menu bar, click the Contact Manager icon. The **Contact Manager** is opened.
- 2 Make sure all input fields in the **Details** and **E-Mail, Fax and Internet** panels are empty. Click the **Reset** button if any of the fields require emptying.
- 3 In the **Details** panel, **Organization or person name** field, enter the name of the organization or individual that is the subject of the contact.
Note: This field is mandatory and must be filled in. The text you enter must not start with a space.
- 4 In the Address 1 line field enter the first line of the contact address.
Note: This field is mandatory and must be filled in. The text you enter must not start with a space.
- 5 Complete the remaining optional address fields and reference fields as appropriate.
- 6 In the **E-Mail, Fax and Internet** panel, enter any additional information that may be relevant to your contact.
Note: You can insert free form text in the **Additional info** field. For example, you could enter "A. Bloggs is the customer complaint manager on extension 5432".
- 7 Click the **Save** button. A message is displayed confirming that your contact has been saved.

5.2 Modifying an Existing Contact

- 1 From the menu bar, click the Contact Manager icon. The **Contact Manager** is opened.
- 2 From the **Select contact** table, move the mouse pointer to the row containing the name and first line of address of the contact that you wish to modify. Click

the right mouse button. The fields in the **Details** and **E-Mail, Fax and Internet** panel are populated with the contact details.

- 3 Move the cursor to the fields you wish to modify and rewrite or edit the information you require for those fields.
- 4 Click the **Save** button. A message is displayed confirming that your contact details have been modified.

5.3 Deleting a Contact

- 1 From the menu bar, click the Contact Manager icon. The **Contact Manager** is opened.
- 2 From the **Select contact** table, move the mouse pointer to the row containing the name and first line of address of the contact that you wish to delete. The fields in the **Details** and **E-Mail, Fax and Internet** panel are populated with the contact details.
- 3 Click the **Delete** button. A message box is displayed that asks you to confirm that you really want to delete the contact. Are you sure you want to delete the contact?

No: In the message box, click the **No** button. The contact will not be deleted.

Yes: In the message box, click the **Yes** button. The contact will be deleted and a message box displayed confirming that the contact has been deleted.

6 The Search Manager

This chapter describes how to use the **Search Manager**. You use the Search Manager to locate documents in the DocPal archive. To limit the number of documents being displayed, you can restrict your search by:

- ◆ The dates your documents were written
- ◆ The document reference.

When you have located the document you want, the Search Manager lets you:

- ◆ Open the document on your desktop
- ◆ Delete the document and its entry in the document summary file
- ◆ Modify the document summary file details.

6.1 Searching for Documents

You can search your file system for the documents you create using DocPal. When you find the document you want, you can open it in OpenOffice.

To make the document search more focused, you can filter the search by the document attributes. For example, you may want to find only those documents that have been addressed to a particular person or organization. You may only be interested in documents that you wrote between two specific dates. If you use references in your documents, you may only be interested in a specific reference. Or you may only be interested in a particular type of document identified by its template, such as letters, faxes, reports, or invoices.

To search for documents, perform the following steps:

- 1 From the menu bar, click the Search Manager icon. The **Search Manager** is opened.
- 2 Do you want to search for specific documents?
No: Go to step 8.
- 3 In the **Attributes** panel, **Addressee** combination box, select documents addressed to an organization or person name or leave the default value **All** if you don't want to filter your search by this attribute.
- 4 From the **Document Type** combination box, select documents of a specific type or leave the default value **All** if you don't want to filter your search by this attribute.
- 5 From the **Reference** combination box, select documents for a specific reference or leave the default value **All** if you don't want to filter your search by this attribute.
- 6 In the **Dates** panel, **From date** field, enter the earliest date of a date range to search for document written on or after the **From date**. You may leave the default date if you do not want to specify this attribute.
Note: The default date is the date of the first document written to your archive.
- 7 In the **To date** field, enter the last date of a date range to search for document written on or before the **To date**. You may leave the default date if you do not want to specify this attribute.

Note: The default date is the date of the most recent document written to your archive.

- 8 Click the **Go** button in the Start search panel. The document archive or the part of the archive you selected is displayed in the **Documents** table.

6.2 Opening a Document

To open a document that you have written previously and which has been stored in your DocPal archive, perform the following steps:

- 1 In the **Documents** table, move your cursor to the row containing the summary details of the document you wish to open and click the right mouse button once.
- 2 Click the **Open** button. The document will be opened in OpenOffice on your desktop.

6.3 Modifying a Document Summary Detail

Sometimes you might wish to modify a document's summary detail. For example, you may have written a letter that you for some reason never sent on the date you wrote it. Some time later you wish to send it so you would need to modify the date written attribute. Or you may subsequently wish to change a subject or a document reference.

To modify a document attribute, perform the following steps:

- 1 In the **Documents** table, move to the row containing the summary details of the document you wish to modify.
- 2 Move the cursor to the column containing the detail you wish to modify and double click the mouse. The table cell containing the detail turns white and the existing value of the cell becomes editable.
- 3 Overwrite or modify the existing value of the cell.
- 4 Press the return or tab right keys. The cell reverts to the green row selected color and the contents of the cell are modified.

Note: Only the summary detail is modified. The contents of the actual document are not modified. You must open the document and modify these details separately. Opening a document is described in the section [Opening a Document](#).

- 5 Do you want to modify another attribute?

No: Go to step 6.

Yes: Go to step 2.

- 6 Do you want to modify another document summary?

No: Go to step 7.

Yes: Go to step 1.

- 7 Click the **Save** button. A message is displayed confirming that the document summary detail has been modified.

6.4 Deleting a Document

Deleting a document means removing both the document `.odt` file from the documents directory and removing the document summary detail from the documents table. You should, therefore, be sure that you no longer need the document before you delete it. You are recommended to backup your documents directory before deleting any documents in case you need them again. To delete a document and the document summary detail, perform the following steps:

- 1 From the menu bar, click the Search Manager icon. The **Search Manager** is opened.
- 1 In the **Documents** table, move to the row containing the summary details of the document you wish to delete and select that row.
- 2 Click the **Delete** button. A message box is displayed that asks you to confirm that you really want to delete the document. Are you sure you want to delete the template?

No: In the message box, click the **No** button. The document will not be deleted.

Yes: In the message box, click the **Yes** button. The document file will be deleted, the **Documents** table updated and a message box displayed confirming that the document has been deleted is displayed.

7 OpenOffice Templates

You cannot create OpenOffice Writer templates, that is, `.ott` files, using DocPal. You must create new templates using OpenOffice, or search the web for templates that you can download, either for free or for a charge.

For additional information about creating your own OpenOffice templates, see www.tutorialsforopenoffice.org/tutorial/Create_A_Template.html

A number of sites let you download finished OpenOffice write templates, including: templates.services.openoffice.org/en/templates/business

Whether you create your own template or download templates, you must modify your template so that DocPal is able to populate the document you create with the document attributes, such as contact name, address, etcetera, you want to include.

7.1 Bookmarks

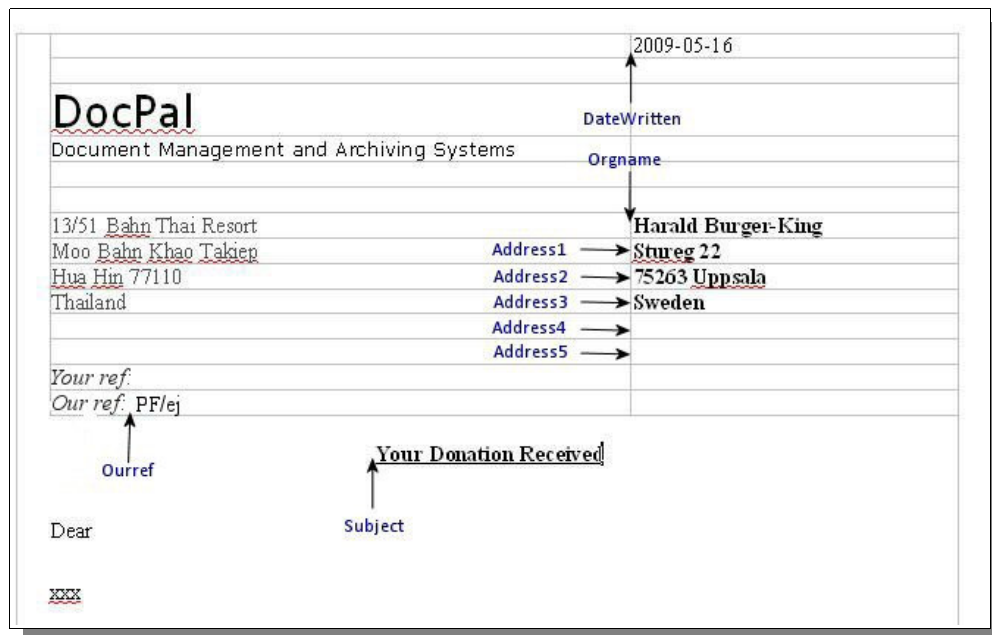
DocPal inserts document attributes directly after bookmarks that you insert in your template. When you insert a bookmark, you must use the exact name for that bookmark as described in table 4:

Bookmark name	Description
Orgname	Populates the document with the person or organization name.
Address1	Populates the document with the first line of the address.
Address2	Populates the document with the second line of the address.
Address3	Populates the document with the third line of the address.
Address4	Populates the document with the fourth line of the address.
Address5	Populates the document with the fifth line of the address.
Ouref	Populates the document with a reference to the document.
DateWritten	Populates the document with the date the document is written.
Subject	Populates the document with a subject.

Table:3: Bookmarks used by DocPal

Figure 6 shows where these bookmarks are inserted in the sample OpenOffice Writer document created from the sample business letter template `BLetter.ott` that is delivered with the DocPal release:

Figure 6: Position of Bookmarks in Sample Template BLetter.ott



Note: Some templates do not require all bookmarks to be inserted. For example, an internal memo will probably not require the address fields. You do not have to use all the available bookmarks when inserting bookmarks into your template.

7.2 Storing Templates

After you create or download a template and insert the bookmarks in the template, you must copy the template to the templates folder found under the data directory you chose when you setup DocPal the first time you ran it.

The next time you run DocPal you will be notified that a new template has been found. The following message is displayed:

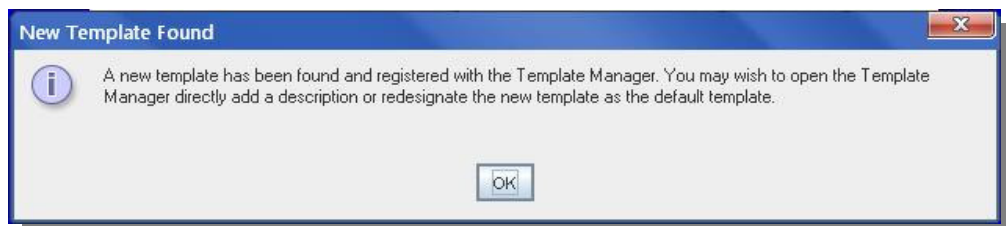


Figure 7: New Template Found message

The new template will now be shown in the Template Manager template table with a default description <new template description>. You can modify this description to something more meaningful by opening the Template Manager and performing the procedure described in the section [Modifying Template Summary Details](#) in Chapter 8.

8 The Template Manager

8.1 The Default Template

DocPal lets you define a default template. DocPal recognizes that you may want to keep multiple templates, but one of these may be the one you use the most. So when you create a new document with the Document Manager, the default template will be used unless you select a different template from the Document Manager **Template file name** combination box. You can change the default template and assign a new one as described in the next section [Modifying Template Summary Details](#).

8.2 Modifying Template Summary Details

- 1 From the menu bar, click the Template Manager icon. The **Template Manager** is opened.
- 2 From the **Select template** table, move to the row containing the summary details of the template you wish to modify and click the right mouse button. The fields in the **Template detail** panel are populated with the template summary details.
- 3 Select the **Description** or the **Set as default** checkbox and edit the field as required.
- 4 Click the **Save** button. A message is displayed confirming that the template summary detail has been modified.

8.3 Deleting a Template

Deleting a template means removing both the template `.ott` file from the templates directory and removing the template summary detail from the templates table. You should, therefore, be sure that you no longer have any need for the template before you delete it. To delete a template and the template summary detail, perform the following steps:

- 1 From the menu bar, click the Template Manager icon. The **Template Manager** is opened.
- 2 From the **Select template** table, move the mouse pointer to the row containing the summary detail of the template that you wish to delete. The fields in the **Template detail** panel are populated with the template details.
- 3 Click the **Delete** button. A message box is displayed that asks you to confirm that you really want to delete the template. Are you sure you want to delete the template?

No: In the message box, click the **No** button. The template will not be deleted.

Yes: In the message box, click the **Yes** button. The template file will be deleted, the **Select template** table updated and a message box displayed confirming that the template has been deleted is displayed.