



**DOCUMENT QUICK START
GUIDE**

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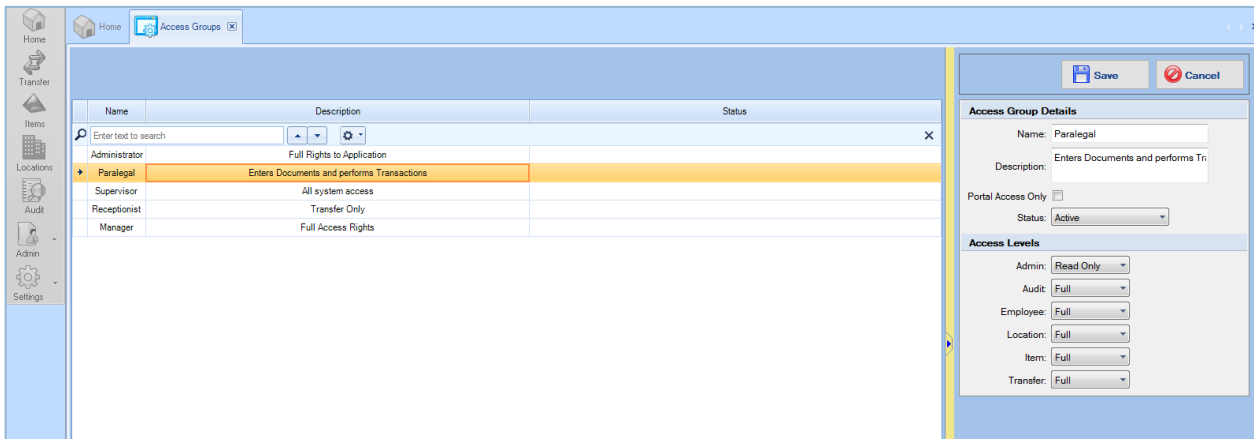
Please refer to the Document Tracking “PC Install” guide to get your system downloaded.

After installing, start by double-clicking on the Document Tracking System icon located on the desktop. If you are using a network location, only the first person to enter the system will need to follow these steps.

1. Enter in the Server name and Database name. When entering the SQL Server Name or IP Address, add it backslash if you are using a named instance. (Ex. myserver2\SQLExpress)
2. Enter the Customer Ident and License Key that was provided in your Order Acknowledgement email, and click “Register”.

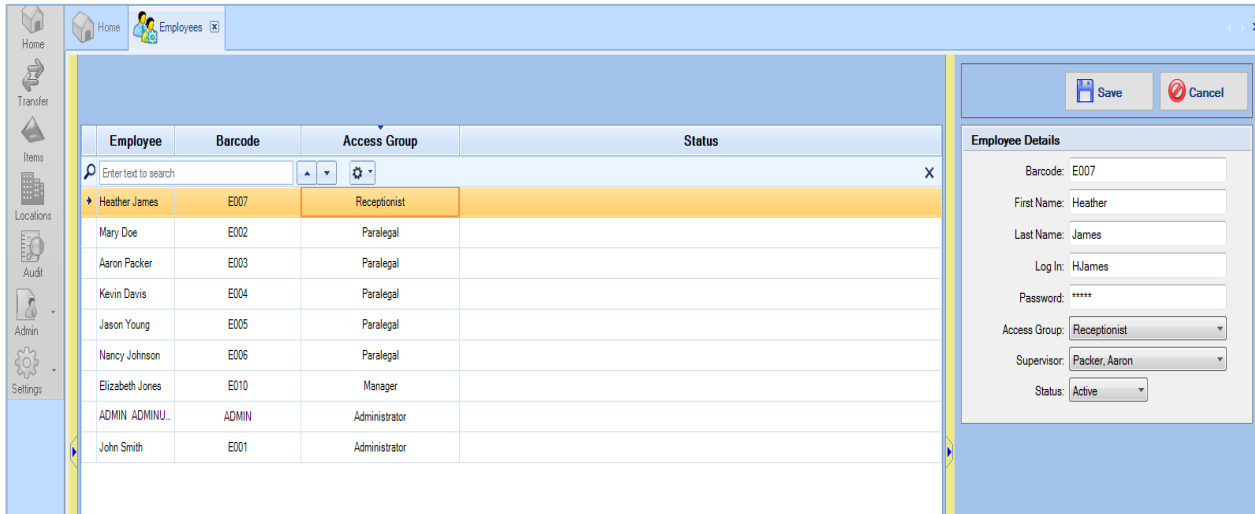
CREATE ACCESS GROUPS

Start by creating Access Groups under the Admin icon. You can create as many Access Groups as you wish. Press “Add” and the Group Details section will appear on the right-hand-side of the screen. Give the group a Name, Description, and Set Access Levels. Access Levels are none, read only, or full edit rights. Then Hit Save. The ‘Administrator’ access group will already be in the system and you will be unable to Edit this group. Here are a few examples,



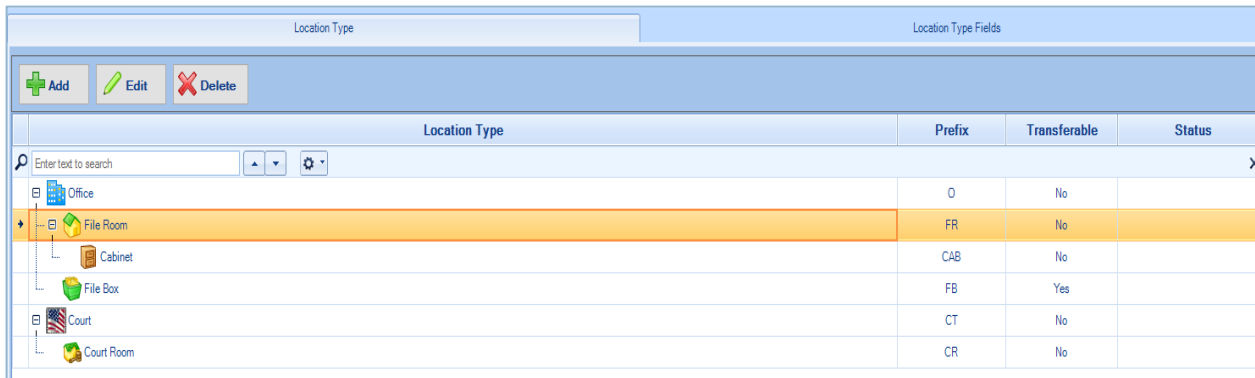
CREATE USERS

Next, go to Admin, Employees. Now we can enter specific user information and assign them to one of the Access Groups we created. Press “Add” and fill out the Employee Details box on the right. Every Employee will have a barcode (unique identifier), first and last name, login information, and be assigned to an Access Group.



LOCATION TYPES

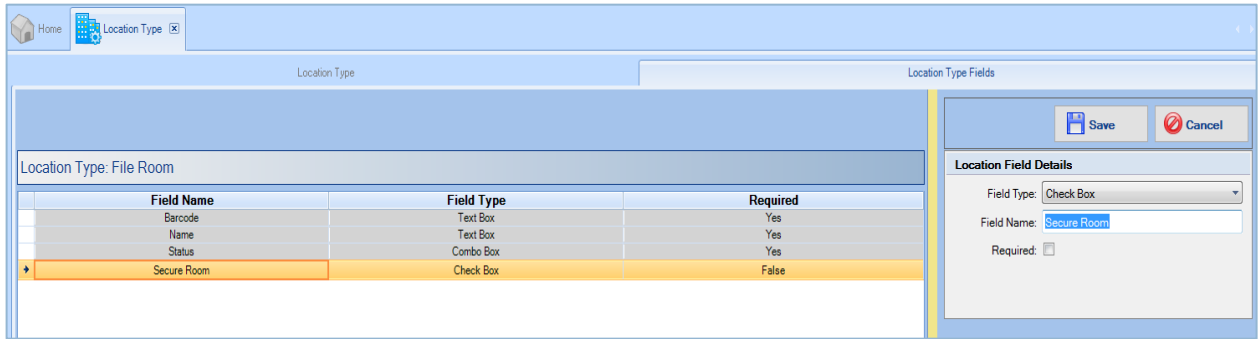
To create your Location Types hierarchy, go to Admin, Locations. Here you will build the general structure of where your Documents might go or be stored. You can choose to get very specific with your hierarchy or very general. Remember, you are not yet entering specific Location information but just the structure. When adding in a Location, you will pick “Add Child” if that location goes underneath the one on top. Here is an example structure,



When adding in a new Location Type, you will need to give it a name, Barcode Prefix (or check the box for auto-barcode), an image (custom or use a stock image in the system), and choose whether this

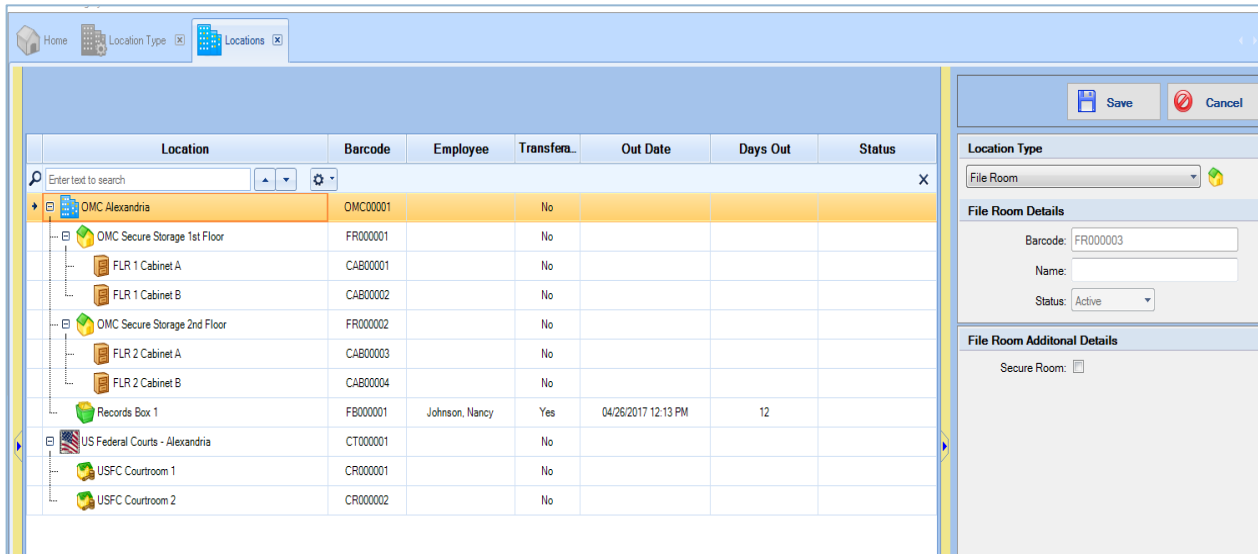
Location Type is transferrable or not. A transferrable item means that you are able to move that Location to another Location. For example, I can move a File Box to another Location therefore it is Transferrable. I cannot move a Court Room to another Court Room.

On the second tab under Location Types, you can also add in User Defined Fields. All items that are greyed out are required fields and are not able to be edited. To Add a field, simply click “Add” and enter the Location Field Details on the right.



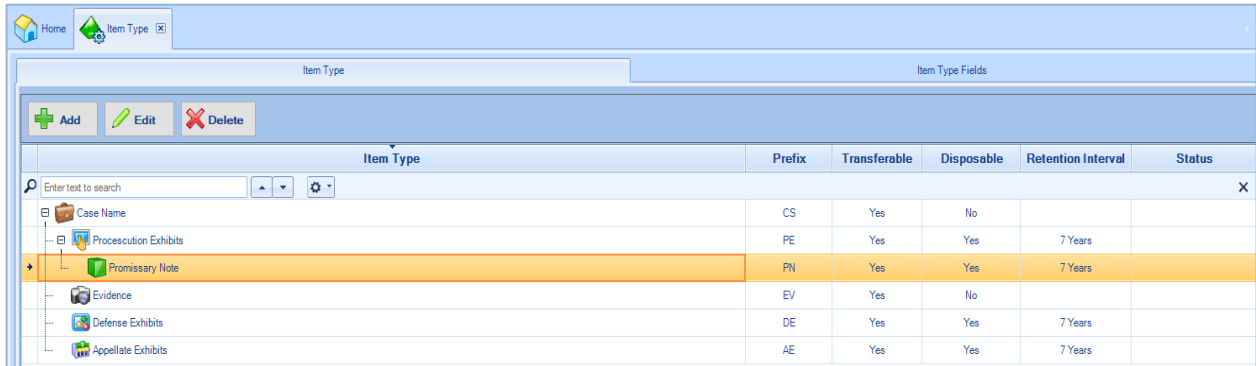
LOCATIONS

Using the hierarchy, you just built, you can now enter specific Locations. Click on the Locations Icon. Press “Add” and you will be able to choose which Type of Location you want to Add. If your auto-barcode is on, you will just need to give the Location a name. Any User Defined Fields will be listed under Additional Details for that Location.



ITEM TYPES

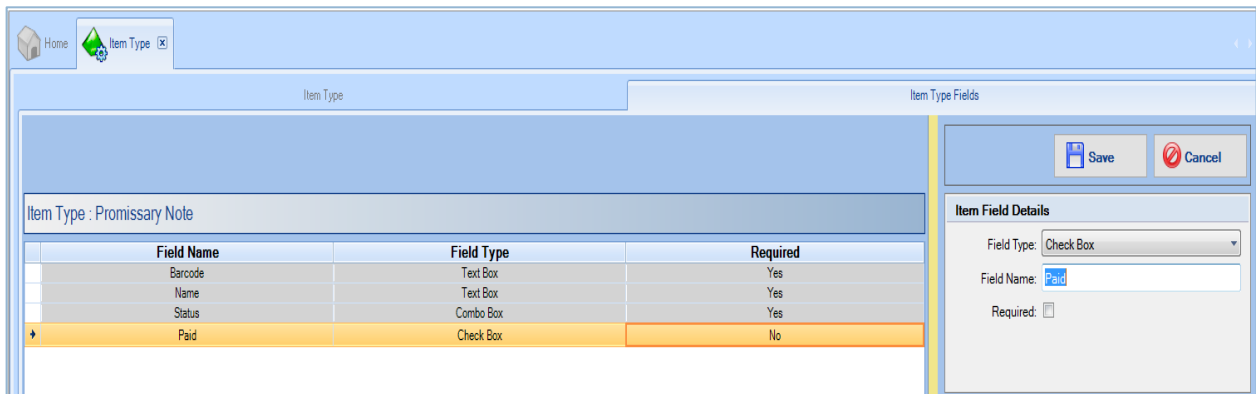
Items Types, or documents, are much like Locations and Location Types. Go to Admin, Item Types to start building your hierarchy for your Documents. In this section, we are not yet entering specific documents but just the structure that they will fall under. You can choose to get a specific as you want with your types. Press “Add” to add in a new type. Give it a name and a barcode prefix, select an image, and choose with this Type is Disposable or Transferable. You can then start creating a hierarchy by adding in “Child Type” underneath. For each Item Type, you can also add in User Defined Fields (second tab). Here is a basic hierarchy,



The screenshot shows the 'Item Type' management interface. It features a search bar, a tree view on the left, and a main table. The tree view shows a hierarchy: Case Name, Prosecution Exhibits, Promissory Note (selected), Evidence, Defense Exhibits, and Appellate Exhibits. The main table lists the following item types:

Item Type	Prefix	Transferable	Disposable	Retention Interval	Status
Case Name	CS	Yes	No		
Prosecution Exhibits	PE	Yes	Yes	7 Years	
Promissory Note	PN	Yes	Yes	7 Years	
Evidence	EV	Yes	No		
Defense Exhibits	DE	Yes	Yes	7 Years	
Appellate Exhibits	AE	Yes	Yes	7 Years	

Here is an example of a field for the “Promissory Note” type that asks for a check box if the item is ‘Paid’,



The screenshot shows the 'Item Type Fields' configuration interface for the 'Promissory Note' item type. It includes a table of fields and a details panel on the right.

Field Name	Field Type	Required
Barcode	Text Box	Yes
Name	Text Box	Yes
Status	Combo Box	Yes
Paid	Check Box	No

The 'Item Field Details' panel on the right shows the configuration for the 'Paid' field:

- Field Type: Check Box
- Field Name: Paid
- Required:

ITEMS

Now, we can enter actual documents or Items. Click on the Items icon. Press 'Add' to add in a new document. Below is a basic structure of a Case with children underneath it as the actual documents. Continue doing this for all of your documents.

The screenshot shows the 'Items' management interface. On the left, a tree view shows a case named 'KB1234 vs. Kelsey Barns' with 25 items listed below it. The main table displays the following data:

Items (25)	Barcode	Created Date	Employee	Days Out	Location	Out Date
KB1234 vs. Kelsey Barns	CS000001	02/13/2017		4	US Federal Courts - AL	05/04/2017 8:56 AM
PE1001 Cell Phone Records	PE000001	02/13/2017	Doe, Mary	4		05/04/2017 9:26 AM
PE1002 Bank Records	PE000002	02/13/2017	Smith, John	13		04/25/2017 11:22 AM
DE1001 Travel Records	DE000001	02/13/2017	Doe, Mary	4		05/04/2017 9:26 AM
EV1001 Fingerprint Records	EV000001	02/13/2017	Packer, Aaron	4		05/04/2017 8:56 AM
PE2255 Receipts	PE000008	02/16/2017	Doe, Mary	4		05/04/2017 9:26 AM
EV6855 Victim Clothing	EV000004	02/16/2017	Doe, Mary	4		05/04/2017 9:26 AM
Crime Timeline	EV000005	03/16/2017	Packer, Aaron	53		03/16/2017 9:55 AM
Cell Phone Records	EV000006	05/04/2017	Packer, Aaron	4		05/04/2017 9:31 AM
BH3456 vs. Bob Hagerman	CS000002	02/13/2017				
PE2001 Cell Records	PE000003	02/13/2017	James, Heather	13		04/25/2017 11:22 AM
EV2002 Physical Evidence	EV000002	02/13/2017	Davis, Kevin	17		04/21/2017 3:33 PM
DE2003 Travel Records	DE000002	02/13/2017	Johnson, Nancy	14		04/24/2017 8:56 AM
HD8878 vs. Harrison Dwight	CS000003	02/14/2017				
PE1001 Crime Timeline	PE000005	02/14/2017	James, Heather	17		04/21/2017 4:31 PM
DE1001 Prosecution Timeline	DE000003	02/14/2017	Johnson, Nancy	14		04/24/2017 8:56 AM
AE1001 Fingerprint Records	AE000001	02/14/2017	Davis, Kevin	14		04/24/2017 3:44 PM
KH6533 vs. Kerry Walter	CS000004	02/14/2017				
PE1001 Text Records	PE000006	02/14/2017	Davis, Kevin	14		04/24/2017 3:44 PM
DE1010 Security Camera Footage	DE000004	02/14/2017	James, Heather	14		04/24/2017 3:45 PM
AE2020 Travel Records	AE000002	02/14/2017	Packer, Aaron	4		05/04/2017 8:56 AM

On the right, the 'Item Type' details panel shows the following information:

- Case Name: KB1234 vs. Kelsey Barns
- Barcode: CS000001
- Created Date: 02/13/2017
- Notes: KB1234
- Status: Active
- Case Name Additional Details: Case Number: KB1234

TRANSFER

Finally, you can transfer documents to Locations or Employees. Click on the 'Transfer' icon. Here we can scan the barcode of the Location or Employee we want to Transfer to or simply click on the employee or location look-up images. Then scan the barcode of the documents you are assigning to that person or location.

The screenshot shows the 'Transfer' interface. The 'Transfer Options' section includes:

- Transfer To: E002 (Location)
- Employee: Doe, Mary
- Item / Location Barcode: (empty)
- Item: EV2002 Physical Evidence

Buttons for 'Reset', 'Transfer', and 'View Errors' are visible.

The transfer history table is as follows:

Item / Location	Transfer To	Date	Status	Transferred by
EV1001 Fingerprint Records	Doe, Mary	05/08/2017 12:42 PM	Transfer Complete	ADMIN ADMINUSER
PE2001 Cell Records	Doe, Mary	05/08/2017 12:42 PM	Transfer Complete	ADMIN ADMINUSER
EV2002 Physical Evidence	Doe, Mary	05/08/2017 12:42 PM	Transfer Complete	ADMIN ADMINUSER

SUPPORT

This quick-start guide is meant only for quick system setup and usage. Please refer to the User Manual for a more detailed explanation of the system. If you have specific questions, please contact support@gigatrak.com