



Quick Start Guide



▶ Starting GLOBODOX



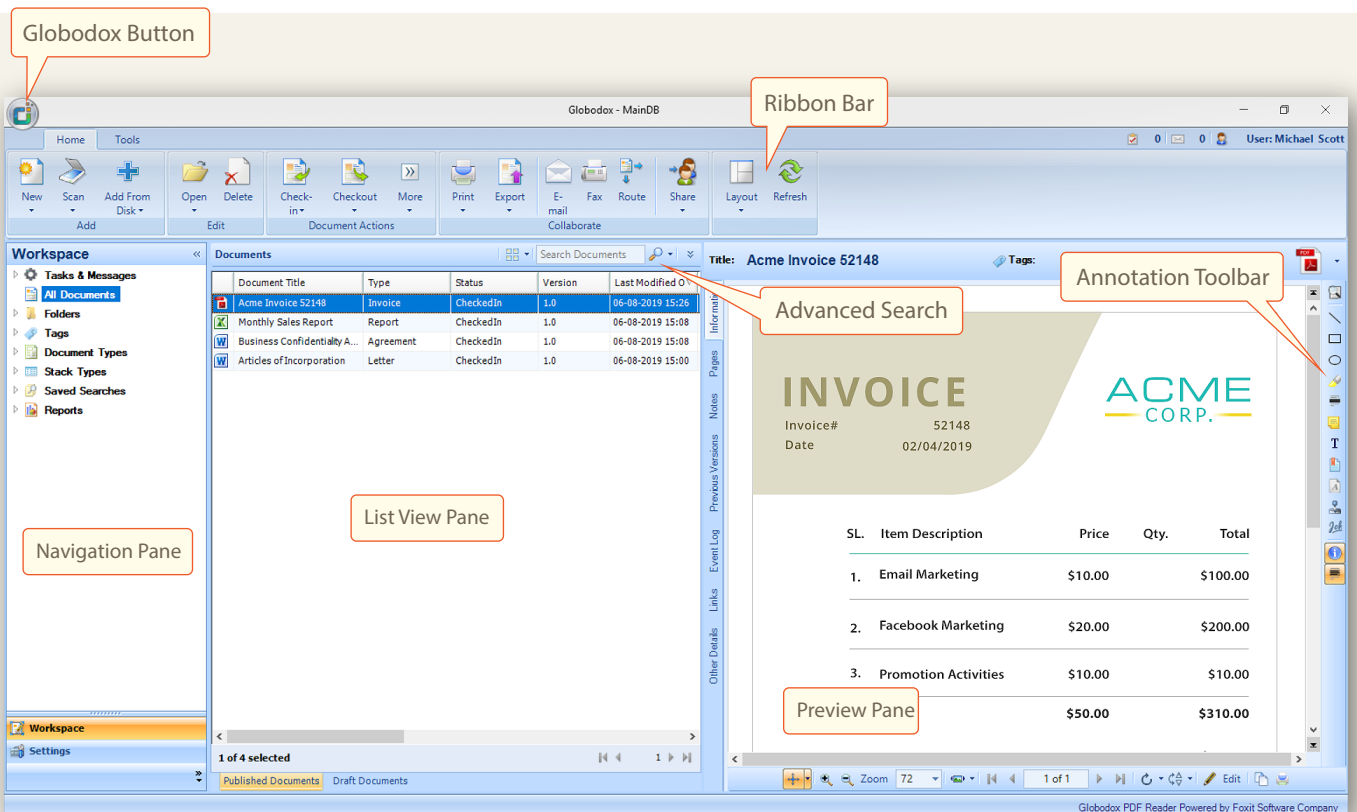
Click on Start > All Programs > Globodox or double click Globodox desktop icon to run Globodox.

Login as Superadmin.

Username : superadmin

Password : superadmin

The **Main DB** will open by default.



The screenshot shows the Globodox MainDB interface. The top ribbon bar contains tabs for Home and Tools, with various icons for document actions. The left navigation pane shows a tree view of the workspace, including folders, tags, document types, stack types, saved searches, and reports. The main area is divided into a list view pane on the left and a preview pane on the right. The list view pane displays a table of documents, and the preview pane shows a detailed view of a selected document, including an invoice form and a table of items.

Globodox Button

Ribbon Bar

Navigation Pane

List View Pane

Advanced Search

Annotation Toolbar

Preview Pane

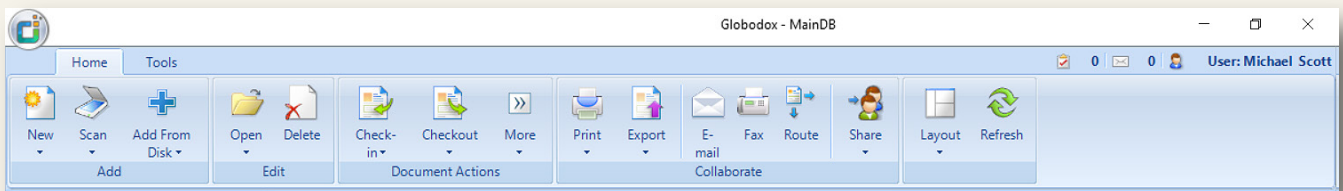
Document Title	Type	Status	Version	Last Modified
Acme Invoice 52148	Invoice	CheckedIn	1.0	06-08-2019 15:26
Monthly Sales Report	Report	CheckedIn	1.0	06-08-2019 15:08
Business Confidentiality A...	Agreement	CheckedIn	1.0	06-08-2019 15:08
Articles of Incorporation	Letter	CheckedIn	1.0	06-08-2019 15:00

SL.	Item Description	Price	Qty.	Total
1.	Email Marketing	\$10.00		\$100.00
2.	Facebook Marketing	\$20.00		\$200.00
3.	Promotion Activities	\$10.00		\$10.00
			\$50.00	\$310.00

▶ GLOBODOX User Interface

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

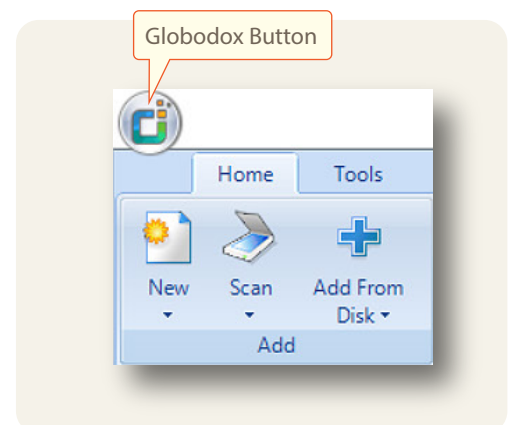
1. Ribbon Bar



The Ribbon bar is divided into tabs (Home and Tools), which group related features together. This makes all important tools and features of Globodex 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.

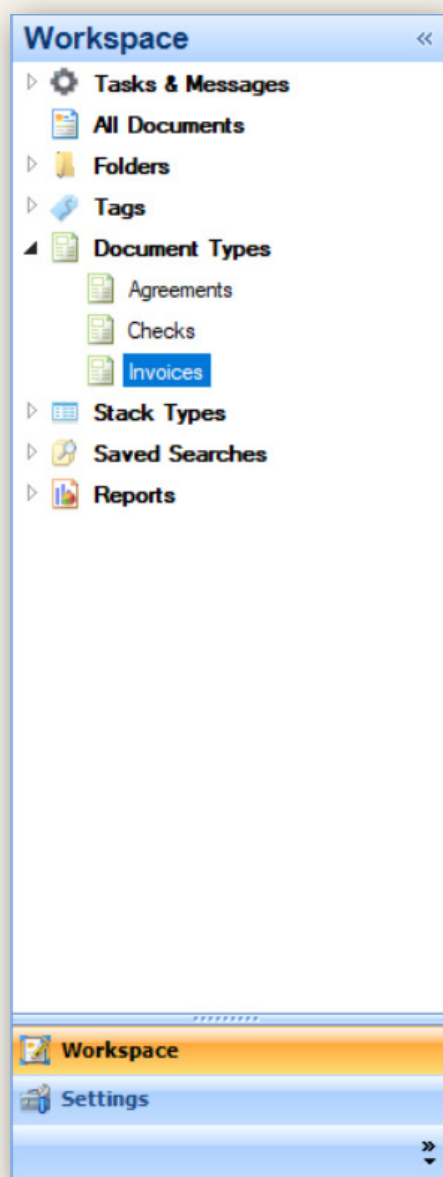
Globodex Button: Use the Globodex button to launch a menu with options to Login/Logout, Open/Close DB and to view the Options dialog.





▶ GLOBODOX User Interface

2. Navigation pane



The Navigation pane gives you quick access to all the 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, Folders). Selecting a navigation item displays the related information in the list view. The Navigation pane appears on the left side of Globodox window.

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

The number of Navigation groups being displayed in the Navigation pane, can be reduced by clicking the Double Arrow on the bottom right corner of the Navigation pane and selecting the Show fewer buttons option. You can also click on the double arrow on the bottom right corner of the Navigation pane and select the Navigation pane options to change the order of the Navigation groups or to reduce the number of navigation groups.



► GLOBODOX User Interface

3. List View Pane

Added On	DocumentTitle	Invoice Number	Vendor Name	Invoice Date	Version	Status	Approved
30-05-2018 08:46	Inv_49821	49821	Company A	30-05-2018	4.0	CheckedIn	<input type="checkbox"/>
10-07-2017 12:30	Inv_2014350178	2014350178	Company C	21-12-2017	3.0	CheckedIn	<input type="checkbox"/>
17-01-2018 08:45	1	201304904	Company C	17-01-2018	2.0	CheckedIn	<input type="checkbox"/>
11-04-2018 11:17	Inv_2014350178	701415tl178	Acme Corporation	11-04-2018	1.0	CheckedIn	<input checked="" type="checkbox"/>
18-04-2018 14:23	Inv_2014350178	2014350178	Acme Corporation	18-04-2018	1.0	CheckedOut	<input type="checkbox"/>
30-05-2018 08:47	Inv_2014350178	2014350178	Acme Corporation	30-05-2018	1.0	CheckedIn	<input checked="" type="checkbox"/>
05-07-2018 14:07	Inv_49821	49821	Company G	05-07-2018	1.0	CheckedIn	<input type="checkbox"/>
05-07-2018 14:10	Inv_2014350178	2014350178	Acme Corporation	05-07-2018	1.0	CheckedIn	<input checked="" type="checkbox"/>
19-07-2018 13:28	Inv_49821	49821	Company C	19-07-2018	1.0	CheckedIn	<input type="checkbox"/>
19-07-2018 13:31	Inv_2014350178	2014350178	Acme Corporation	10-07-2018	1.0	CheckedIn	<input type="checkbox"/>
03-08-2018 11:25	1	2014	Company E	03-08-2018	1.0	CheckedIn	<input type="checkbox"/>
03-08-2018 11:26	Inv_2014350178	2014350178	Acme Corporation	03-08-2018	1.0	CheckedIn	<input type="checkbox"/>
27-09-2018 09:17	1		Company E	03-08-2018	1.0	CheckedIn	<input type="checkbox"/>
27-09-2018 09:19	Inv_2014350178		Company E	03-08-2018	1.0	CheckedIn	<input type="checkbox"/>
16-01-2019 14:19	1		Company E	03-08-2018	1.0	CheckedIn	<input type="checkbox"/>
16-01-2019 14:21	Inv_2014350178	1234	Company A	16-01-2019	1.0	CheckedIn	<input type="checkbox"/>
03-06-2019 09:21	Inv_49821	49821	Company G	03-06-2019	1.0	CheckedIn	<input type="checkbox"/>
03-06-2019 09:22	Inv_2014350178	2014350176	Acme Corporation	03-06-2019	1.0	CheckedIn	<input type="checkbox"/>
11-07-2019 11:15	Inv_49821		Company G	11-07-2019	1.0	CheckedIn	<input type="checkbox"/>
11-07-2019 11:19	Inv_2014350178		Company G	11-07-2019	1.0	CheckedIn	<input type="checkbox"/>
30-08-2019 13:37	1		Company G	30-08-2019	1.0	CheckedIn	<input type="checkbox"/>
30-08-2019 13:39	Inv_2014350178	2014350178	Company D	30-08-2019	1.0	CheckedIn	<input type="checkbox"/>
26-11-2019 17:20	Acme Invoice A	A100567	Company D	24-03-2019	1.0	CheckedIn	<input checked="" type="checkbox"/>

1 of 39 selected

This pane lists (displays) multiple items at a time. By default 50 items are displayed on the List View pane. If there are more than 50 items then remaining items will be displayed to the next page. To view the next page use the Navigation buttons below the List View pane. You can change the number of items displayed per page from the Options dialog. 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 column header and deselect the column from the column list. Click the column header to sort values in that column in the ascending or descending order.

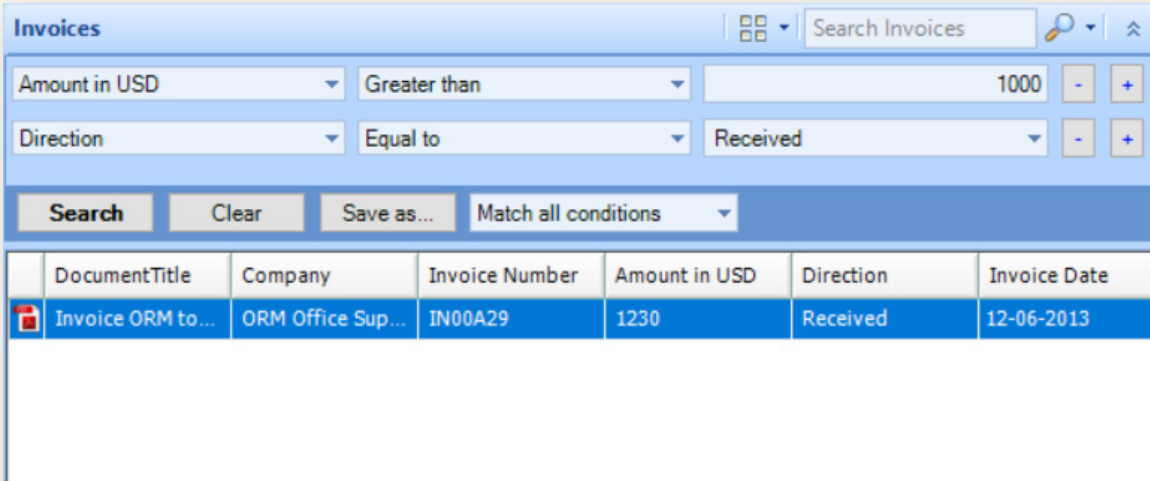
Quick Search: Use the Quick Search box to find items quickly. When you move your mouse pointer over the Quick Search box, You will see a tooltip with a list of fields that are going to be searched. To search type a word which you know occurs in the indexing fields of the document or in the document's content and hit Enter.

▶ GLOBODOX User Interface

Advanced Search: Use the Advanced Search to narrow down the search results and to make them more specific by adding criteria to your query. Click the double arrow besides the Quick Search box to use the Advanced Search.



E.g. Let's say you want to view all invoices you have received for amounts greater than US \$1000. By using the query below you can easily get those documents...



DocumentTitle	Company	Invoice Number	Amount in USD	Direction	Invoice Date
Invoice ORM to...	ORM Office Sup...	IN00A29	1230	Received	12-06-2013



► GLOBODOX User Interface

4. Details Pane

This pane displays a single item at a time. When a document or a Stack 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.

The screenshot shows the Globodex PDF Reader interface. The title bar indicates 'Globodex - Sample DB' and the user is 'Super Administrator'. The interface includes a toolbar with options like Export, E-mail, Fax, Route, Share, Layout, and Refresh. The main area is divided into a left pane (List View) and a right pane (Details Pane).

The List View pane on the left displays a table of documents with columns for Version and Last Modified (La). The table shows multiple versions of documents, with the most recent version (4.0) selected.

The Details Pane on the right displays the selected document, titled 'Business-Confidentiality-Agreement'. It includes a 'Tags' section and a 'Business Confidentiality Agreement' section. The document content is displayed in the center, showing the agreement text and a list of items.

The Details Pane also includes a sidebar with tabs for Information, Pages, Notes, Previous Versions, Event Log, Links, and Other Details. The 'Information' tab is currently selected, showing fields for Document Type, Company, Date of Agreement, Place of Agreement, Signed by, and Published.

The 'Other Information' section at the bottom of the Details Pane includes fields for Related Stack (Acme Corp.) and Related Folder (Change... X).

The bottom of the interface features a PDF Reader toolbar with options like Zoom, 1 of 3, and navigation controls. The footer text reads 'Globodex PDF Reader Powered by Foxit Software Company'.



▶ Managing Your Documents

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

▶ Folders

▶ Tags

▶ Document Types

▶ Stack 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 Globodox. The dropped folder, all its sub-folders along with files in them will get added to Globodox.



The folder structure in Globodox is stored inside a database and is therefore very fast. Viewing folder contents, moving documents between folders or moving folders themselves are all very fast.

Globodox folders can be secured. Each user can have their set of private folders and any folder can be shared to make it accessible to other users.

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.





▶ Managing Your Documents

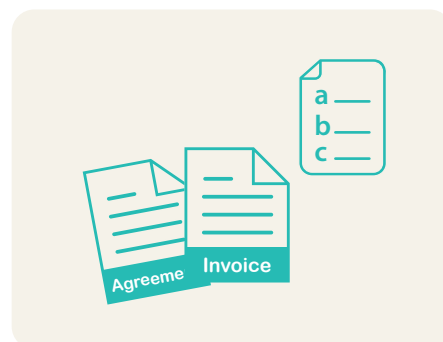
Document Types

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. Invoice Number, Invoice Date, Invoice Amount with each stored Invoice and 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 search for documents.

Globodox 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.



Stack Types

Sometimes there is need to group related documents together. For example, you may be managing documents for multiple projects and might want to quickly access all documents for a particular project. There are several ways to do this in Globodox...

- 1 You could create a folder for each project and put all documents in their respective project folders.
- 2 You could tag each document with the project name
- 3 You could create a field called Project Name in each Document Type you use.





▶ Managing Your Documents

All the above three methods above will help you quickly locate documents by project name. But what if you wanted to also store additional information about each project, such as Project Start Date, Project Manager, Project Type etc.. The above three methods would not work well in this case. Stack Types are meant to handle such situations.

For the above example, you could create a Stack Type called Projects with indexing fields such as Project Name, Project Start Date, Project Manager, Project Type etc.. Now for each project you can create a new stack of the type Projects and add each project's documents to its stack.

Please note each document added to a stack can still have its own Document Type, its own set of tags and can even reside in a folder. You can define as many Stack Types as you want.

Other possible applications for Stack Types are...

- 1 Law firms can create a Stack Type called Cases with indexing fields such as Case Number, Case Title, Client Name etc.. Each Case stack would contain documents related to that case.
- 2 Healthcare offices can create a Stack Type called Patients with indexing fields such as Patient Name, Date of Birth, Gender etc. Each Patient stack would contain documents related to the patient (e.g. X-Rays, Lab Reports, Prescriptions etc.)
- 3 An organization's human resource department can create a Stack type called Employees with indexing fields such as Employee Name, Designation, Department etc.. Each Employee stack would contain documents related to the employee (Photograph, CV, Bio Data, Certifications etc.)

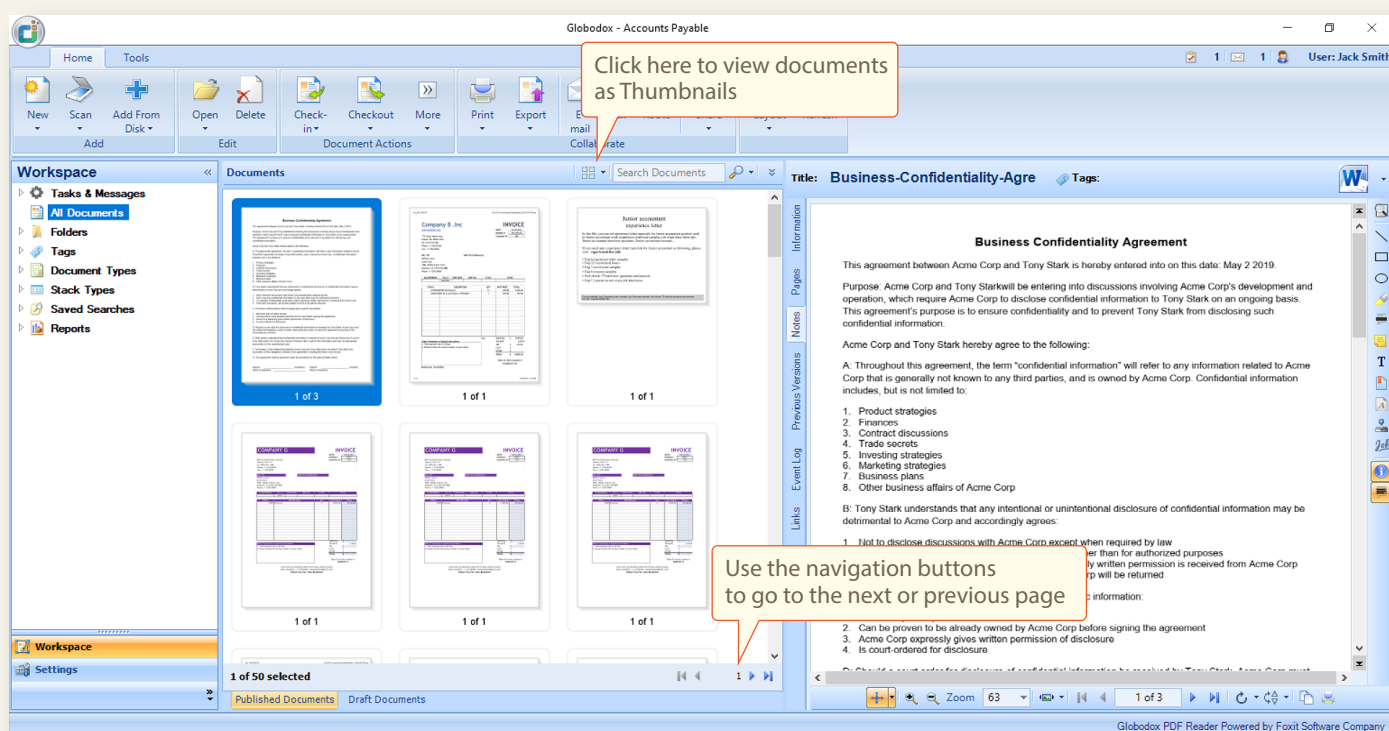
You can also use Stack Types if a group of documents must share the same indexing information or if you just need to store some data without wanting to relate any documents to this data.



Working with Documents

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

The All Documents node displays all documents that the currently logged in user is allowed to view. By default 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. Select the List View option from the Views drop-down to view documents as a list.

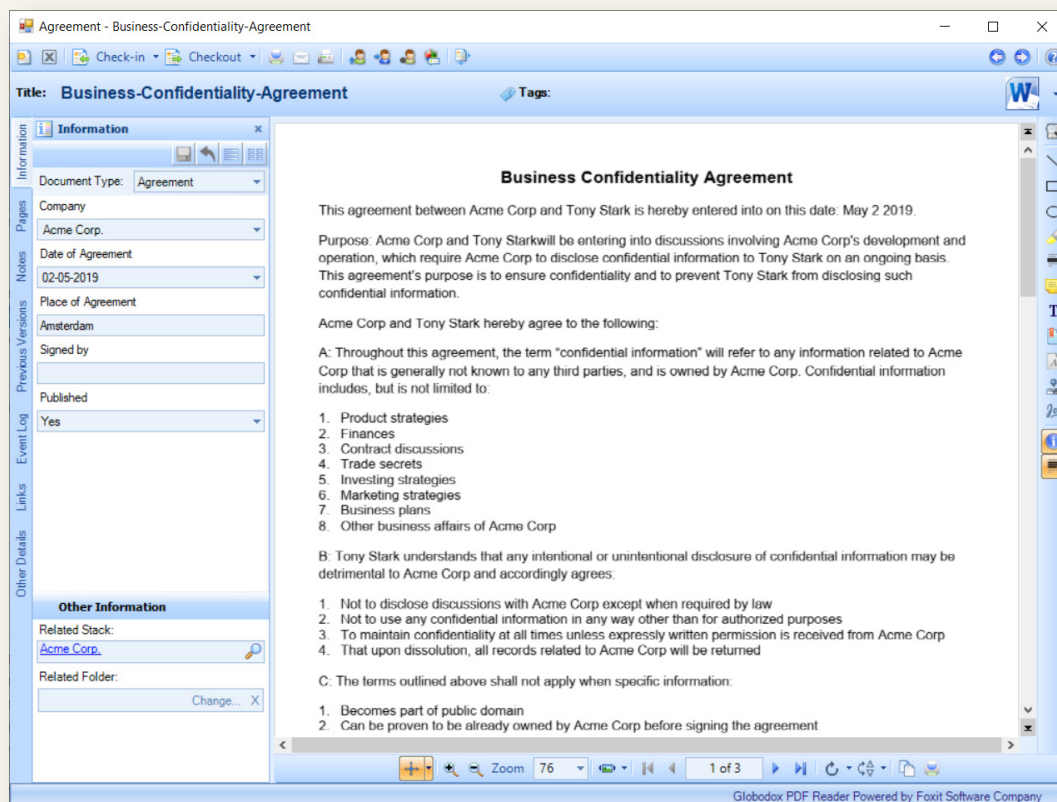


Document Details pane

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.



▶ Working with Documents



The Details window has the actions toolbar on top, towards the right is the Annotation toolbar and at the bottom is the Image toolbar. Annotation and Image toolbars are only displayed if an image is being displayed in the Details window. The document title is displayed in the Title box. Modify the text in this box, to change the document title. Tags can be added to a document using the Tags box. 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 panel 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



▶ Working with Documents

displayed in this box. You can also change the document's folder using this box. displayed in this box. You can also change the document's folder using this box.

Related Stack: If the document is part of a stack, then the name of that stack is displayed in this box. You can also change the stack 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 certain file types will not be displayed.

Notes: The Notes tab displays the notes or comments entered by users, regarding the document. New notes can be added here.

Previous Versions: The Previous Versions tab displays the older versions of the document.

Event Log: The Event Log tab displays the actions carried out on the document. The actions will only be displayed if the Event logging feature is enabled. Event log can be enabled from the Settings pane.

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 Globodox is by dragging and dropping the document on the All Documents node. Documents can also be dragged and dropped in 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 Globodox to automatically save it as a new file. Documents can also be added by using options like the Find and Add and Scan. If you are 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 Globodox. 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 menu. These are some of the actions that are ...



▶ Working with Documents

Email: Select the document(s) and click the Email button on the Home tab or right click the 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 and choosing the Fax option.

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.

Checkout: Right click a document and select the Check-out option to check-out a document.

Check-in: Right click a checked-out document and select the Check-in option to check-in the document.

Share: Right click the document and select the Share option to share documents with other Globodox users. You can also control what actions the users can carry out on the shared documents.

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

Restrict: Restrict documents owned by you from other users.

Annotation

Use the Annotation toolbar to annotate documents. You can mark, highlight, insert text, stamps or signatures and redact (hide) certain parts of the document.

Image Editor Window

The Image Editor Window allows you to modify the displayed file and save it back to the Globodox DB. Using the Image Editor window you can resize, crop and rotate a document.

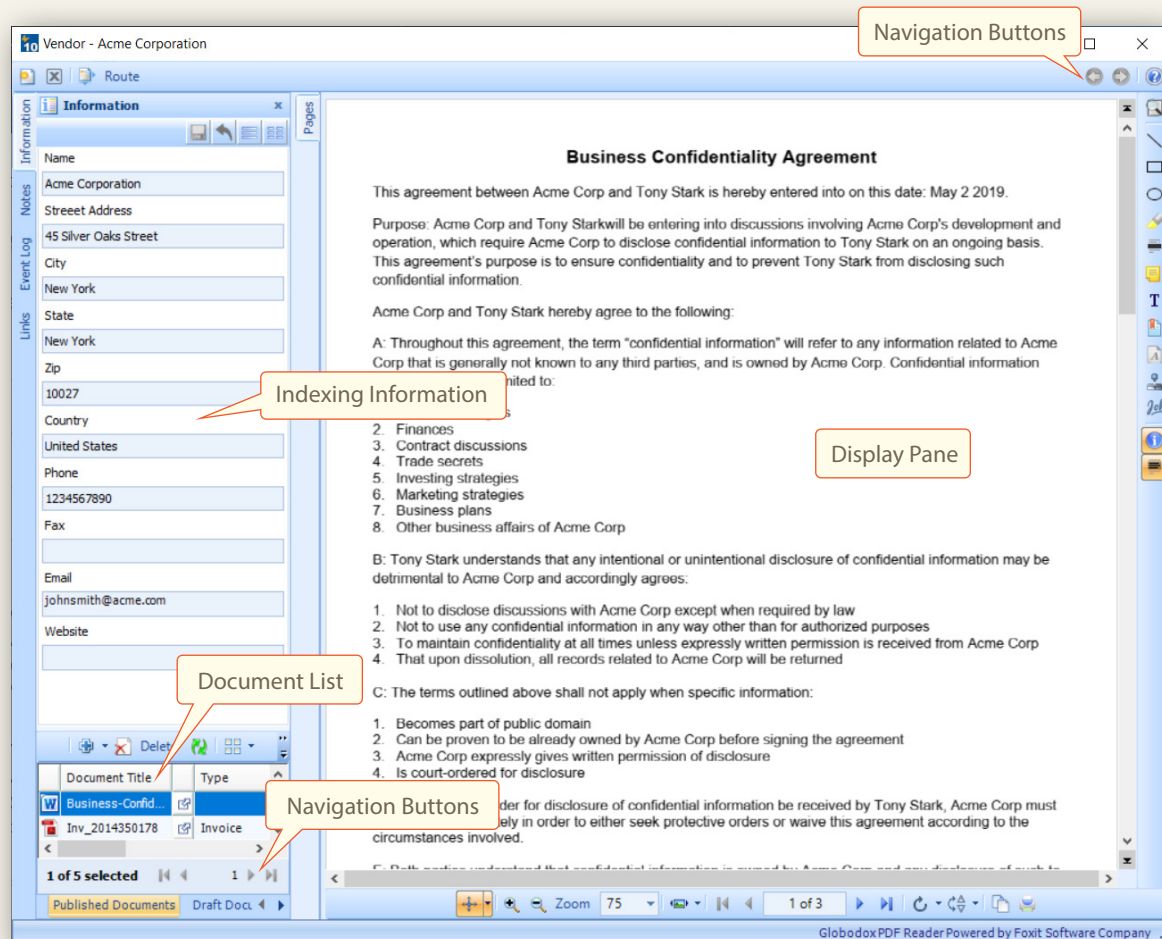


Working with Stack Types

In Workspace, expand the Stack Types node to view the Stack Types. Select a Stack Type to view its Stacks in the List View pane. By default 50 Stacks are displayed in the List View pane. To view more documents use the navigation buttons at the bottom of the List View pane.

Stack Details pane

The Stack that is selected in the List View pane will be displayed in the Details pane. You can also double-click a Stack in the List View pane, to open it in its separate Details window.



This is the Stack Details window. On the left side of the Document Details window there are tabs, they are Information, Notes, Event Log and Links. Towards the right is the Annotation toolbar and at the bottom is the Image toolbar. Use the Navigation button on the top right corner of the Details window to go the next or previous Stack. Use the Navigation button on



▶ Working with Stack Types

the Image toolbar to navigate between the pages of the selected document.

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

Information: The Information pane displays the indexing information and the related documents of the Stack. You can add or modify the indexing information from this pane. You can also relate document to the Stack from this pane. If there is a document related to this stack then its preview will be displayed in the Display pane.

Pages: The pages pane will only appear if a document is related to a Stack. If no documents are displayed then Pages pane will not be displayed. The Pages tab displays all the pages of the selected document as thumbnails. The Pages panel also displays Bookmarks of the selected document. Thumbnails for certain file types will not be displayed.

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

Event Log: The Event Log tab displays the logs (actions) carried out on the selected Stack. The actions will only be displayed if the Event log feature is enabled. Event log can be enabled from Settings pane.

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

To add a Stack to a Stack Type, select a Stack Type in the Navigation Pane and click the New button.

The simplest way of relating a document to a Stack is by dragging and dropping the document to the Document List section of the Stack. A document can at any time be part of only one stack. When a stack is deleted then all documents in the stack are also deleted. If you do not want the documents to be deleted then remove the documents from the stack before deleting the stack.

That's It! You are now ready to use Globodox.