



DocTrak

User Guide

Version 1.0j

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Software by Daughtry

Complexity Made Simple

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Version History

Version	Description
1.0j	<ul style="list-style-type: none">• Renamed application from DocTrack to DocTrak to maintain branding consistency• Recompiled with Clarion 11.0.13630• Company name changed from "Stealthware Software" to "Software by Daughtry"• Added additional graphic file format extensions to the Configuration Screen file selection popup
1.0i	<ul style="list-style-type: none">• Recompiled with Clarion 10• Removed Secwin registration system• Implemented vuLimiter registration system
1.0h	<ul style="list-style-type: none">• Recompiled with Clarion 9.1• Implemented check at startup for missing configuration settings• Fixed minor cosmetic issues with primary browse window and bottom most controls
1.0g	<ul style="list-style-type: none">• Replace the CLOSE button icon with one more suitably sized• Recompiled with Clarion 8• Modified the ABOUT screen design• Added help buttons to every screen• Added CONTRACT field to data dictionary S20 length• Added CONTRACT column to the primary listbox• Added CONTRACT field to the primary data entry screen• Added new screen to define application variables to INI File• Added menu option to access the new variable definition screen• Cleaned up all hardcoded reports• Modified hardcoded reports to use address variables versus hardcoded address• Modified hardcoded reports to use image file variable for the company logo• Modified hardcoded reports - added Contract Number and Transmittal Date• Modified the Internal Tracking Number to use Company Name variable versus hardcoded name• Modified the primary update form to display tracking number in the windows header

- Modified the serial # picture from 4 to 6 characters - increased # items tracked from 9,999 to 999,999
- Added help buttons to every screen
- Added new options for Classified Item Type: External Hard Drive; Thumbdrive
- Added Outlook styled toolbar to MAIN window procedure
- Bug Fix: if destruction date & transmit date <> 0 then current location = In The Facility in main data entry screen
- Added five new fields to track if a classified item has been checked out of the facility
- Modified the primary data entry screen for the five new fields for classified item checkout
- Modified the primary browse screen to show a green icon for checked out items in the listbox
- Added new report for Checked Out Items only; added option to main menu and sidebar
- Removed the Print Receipt button from the primary data entry screen
- Added a new button titled Re-Receipt to the primary data entry screen
- Re-Receipt blanks out Transmittal/Destruction data fields and appends the Notes data entry field with previous transmittal/destruction data
- Added vertical scrollbar to the primary data entry screen NOTES data entry field
- Fixed CREATE attribute for LOO_EMP.TPS database file to create table if not present
- Added Query Wizard to the browse screen
- Replaced DCR reports with sorted reports; no hardcoded filter is applied
- All hard coded reports now call the Query Wizard to set a filter condition
- Added purple icon to browse listbox - shows it transmitted and reply recvd
- Change to the primary data entry screen
- When the SAVE button is clicked if the Destruction Date field isnt zero, meaning the classified holding was destroyed, the data entry field on tab #2 that says CURRENT LOCATION is automatically changed to DESTROYED
- Added icons to Main Menu items

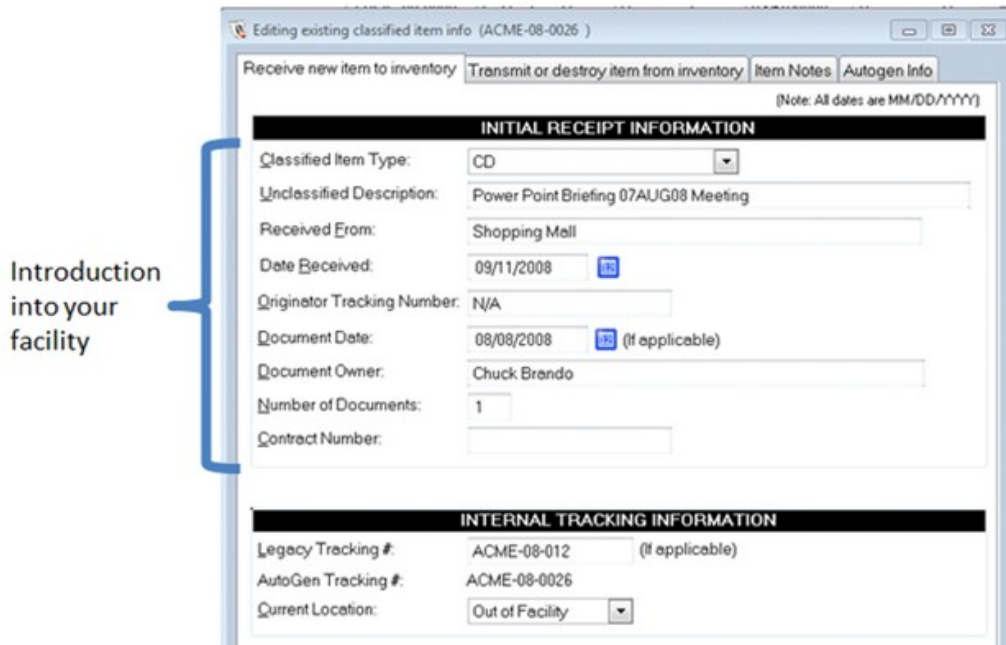
- Fixed button spacing issues in primary browse screen when window resized
- Embedded SECWIN security and registration
- Fixed text in the Define Application Variables screen for new serial number integer length
- 1.0f
 - Removed old popup calendar that was causing the application to crash
- 1.0e
 - Fixed bug in main browse screen - transmittal document did not save browse record pointer
 - Changed every report to add UNCLASSIFIED markings on the report page top and bottom
 - Added custom report print preview screen for all reports
 - Added PDF output option to print preview screen procedure - PDF files generated to user's desktop
- 1.0d
 - Changed late transmittal report filter from 10 days to 30 days
 - Upon program startup the Late Transmittal Report procedure is executed
 - Added report for all DCR records for past two years only
 - Added fourth tab to the data entry screen that explains potential gaps in the AUTOGEN number
- 1.0c
 - Changed application main menu text for Late Transmittal Report
 - Bug fix - fixed icon display in primary browse screen
 - Added new table for Recipient lookup table
 - Added new browse and update screens for Recipient lookup table
 - Added lookup button for Recipient lookup table on primary update screen
- 1.0b
 - Bug fix - stop modifying autogen number when CHANGEing an existing record
 - Bug fix - added thread to Print Invoice from data entry screen to prevent screen from blanking
 - Added administrator browse screen to manually edit autogen number
- 1.0a
 - Initial release

Introduction

DocTrak is a Windows-based software application that was designed to keep track of a small / mid-sized company's classified holdings (e.g. classified computer media; classified documents). Some companies use a spreadsheet or a Word Processing document to manage their classified holdings – while this simplistic method “works”, it doesn't provide a means to easily generate Defense Counterintelligence and Security Agency (DCSA) inspection reports or form letters that are required whenever a classified holding must be destroyed. DocTrak easily generates these types of managerial products, using an intuitive and user-friendly interface that incorporates many tools to expedite data entry while ensuring data integrity.

DocTrak is designed to accommodate all phases of classified item management – from the introduction of the classified item to your facility (either by an employee creating the classified item or your facility receiving the classified item from an outside source); leaving your facility temporarily (for a classified meeting or loaned to another cleared defense company for a joint project); transmittal outside of your facility, and then the destruction of the classified item. The DocTrak primary data entry screen is purposely segregated to accommodate these different phases of classified item management:

- a. Introduction into your facility (First Tab)



b. Checkout / Loan from your facility (Second Tab)

Checkout /
Loaned from
your facility

Editing existing classified item info (ACME-08-0026)

Receive new item to inventory Transmit or destroy item from inventory Item Notes Autogen Info

TRANSMITTAL INFORMATION

Transmit Method: Handcarried By Details: Bambi

Date Transmitted: 08/08/2008

Recipient's Name: ANG

Street Address: 886 Turner Drive City, State, Zip: Albuquerque, NM 87117

Date Received: 08/07/2008

CHECKOUT INFORMATION

Checked Out? Checked Out To?

Destination: Return Suspense Date: 00/00/0000

Checkout Purpose:

DESTRUCTION INFORMATION

Destruction Date: 00/00/0000

Destroyed By?

Destruction Method: Not Applicable

c. Transmittal Information (Second Tab)

Transmitted
from your
facility

Editing existing classified item info (ACME-08-0026)

Receive new item to inventory Transmit or destroy item from inventory Item Notes Autogen Info

TRANSMITTAL INFORMATION

Transmit Method: Handcarried By Details: Bambi

Date Transmitted: 08/08/2008

Recipient's Name: ANG

Street Address: 886 Turner Drive City, State, Zip: Albuquerque, NM 87117

Date Received: 08/07/2008

CHECKOUT INFORMATION

Checked Out? Checked Out To?

Destination: Return Suspense Date: 00/00/0000

Checkout Purpose:

DESTRUCTION INFORMATION

Destruction Date: 00/00/0000

Destroyed By?

Destruction Method: Not Applicable

d. Destruction of the item (Second Tab)

The screenshot shows a web application window titled "Editing existing classified item info (ACME-08-0026)". The window has three tabs: "Receive new item to inventory", "Transmit or destroy item from inventory", and "Item Notes". The "Transmit or destroy item from inventory" tab is active, showing three sections: "TRANSMITTAL INFORMATION", "CHECKOUT INFORMATION", and "DESTRUCTION INFORMATION".

TRANSMITTAL INFORMATION

Transmit Method: Handcarried By (dropdown) Details: Bambi
Date Transmitted: 08/08/2008 (calendar icon)
Recipient's Name: ANG (person icon)
Street Address: 886 Turner Drive City, State, Zip: Albuquerque, NM 87117
Date Received: 08/07/2008 (calendar icon)

CHECKOUT INFORMATION

Checked Out? Checked Out To? _____
Destination: _____ Return Suspense Date: 00/00/0000 (calendar icon)
Checkout Purpose: _____

DESTRUCTION INFORMATION

Destruction Date: 00/00/0000 (calendar icon)
Destroyed By? _____ (person icon)
Destruction Method: Not Applicable (dropdown)

A blue bracket on the left side of the "DESTRUCTION INFORMATION" section is labeled "Destruction of the item".

System Requirements

- Windows 8 (or higher)
- All Windows applications “like” computer memory – a starting point for any Windows machine should really be 16GB of memory. If this application starts running slower, check your Windows Task Manager for applications that are leeching memory (and then start closing them)
- This application runs comfortably within 20MB of disc space
- A decent color monitor capable of displaying 1028x768 (or higher resolution)

Installation

This application’s “setup.exe” program displayed options of where to install this program [e.g. C:\Program Files (X86)]. It also created Start Menu entries for the application, its user manual, and an uninstallation program. An entry was also created within the Windows “Apps” start menu option to uninstall the application. Data file(s) that you created via this application are NOT deleted, and will remain on your computer until you manually delete them.

Generally speaking, you may install newer versions of this application “on top” of itself, as our installation programs won’t overwrite configuration file(s) or data files that you’ve created.

NOTE: It is recommended that DocTrak be installed onto a local computer's hard drive (e.g. C: drive) versus a network share due to security patches that Windows has released that impacts how .CHM files are opened by the operating system. DocTrak will work

seamlessly when installed to a network share (providing your network is reasonably fast and not overburdened).

DocTrak can be installed to a network share to enable your onsite Facility Security Officer(s) to access the program and manage your classified holdings regardless of which computer they use to log onto your company's computer network. Each employee that is identified by your Facility Security Officer as needing to access DocTrak will need to be given CHANGE network permissions to the folder that DocTrak resides within. DocTrak is a network-aware Windows application, and can accommodate multiple users accessing its database files simultaneously. If two (or more) users attempt to access the same database record at the same time, the user that opened that database record first will maintain ownership of that record and subsequent users will be denied access to that database record until it has been released. Reports are generated using the workstation's memory resources and temporary folder location.

DocTrak creates / stores / maintains its database files and its *.INI configuration file in the same folder as its executable (*.EXE) program. DocTrak does not create / store files elsewhere on the workstation or the company's computer network. The application's installer program will follow standard Windows installer protocols (e.g. add an UNINSTALL entry into the Windows registry of the computer used to install the application). The DocTrak report print previewer module can generate a *.PDF file compatible with Adobe Acrobat Reader that contains the same content as the onscreen-displayed report – that *.PDF file is generated to the user's Windows DESKTOP folder, which ensures the user has CREATE permissions to successfully generate that *.PDF file.

Quick Start

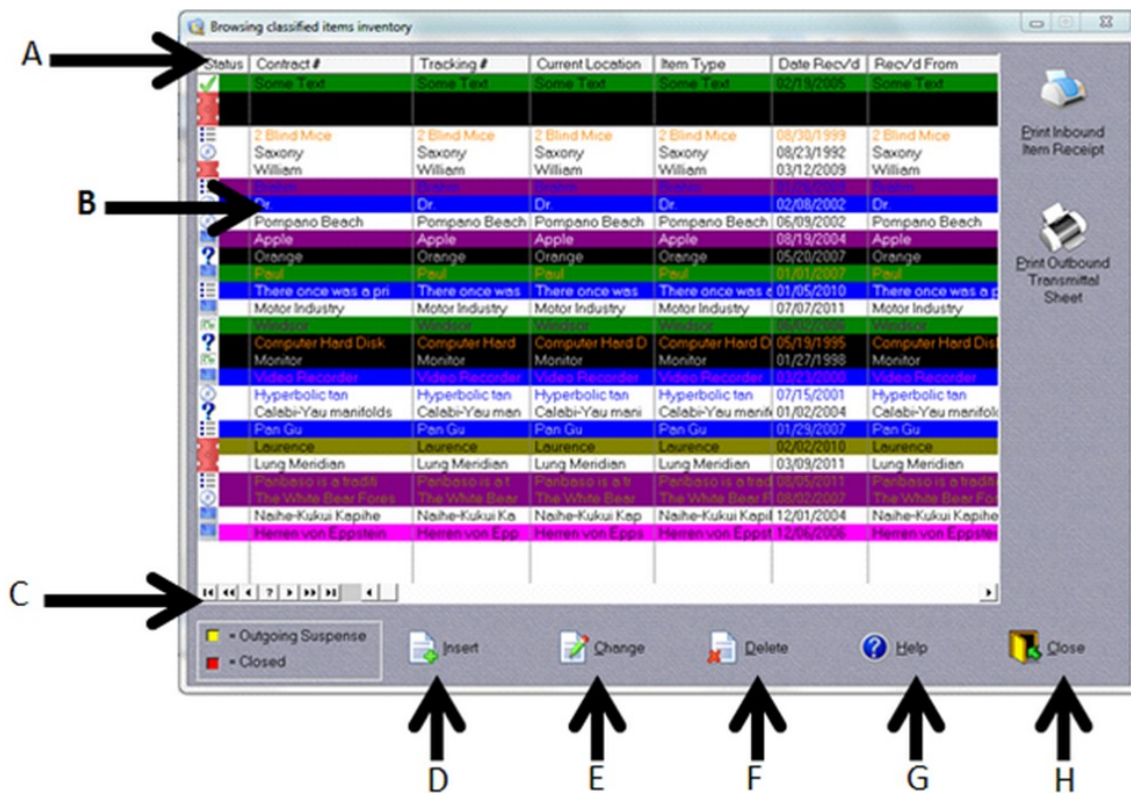
Configuring the DocTrak software application for use within your business is simple and straightforward:

1. Download the trial version from the Software by Daughtry web site
2. Install the trial version onto your business' computer(s); all users must have READ/WRITE (or MODIFY) permissions within the DocTrak folder
3. Update the information stored in the Configure Application Variables screen. Before you add a single classified item into this application, you will need to define the COMPANY PREFIX that is used to define / create the Internal Tracking Number. All of the reports will need your Company Address information and your company's graphic logo defined.
4. Populate the Recipients database of the different locations that your company transmits classified items to.
5. Populate the Employees database with at least the employees that receive / create classified items for your company.

Interface Overview

Basics - Browse Screen

A “browse screen” is used to add / edit / delete information that is stored in the application’s database file(s). The screen contains a large area that displays the database contents in a columnar fashion (i.e. a “listbox”), with buttons to ADD, EDIT, or DELETE data. The listbox displays (i.e. “lists”) information in a columnar format – the columns are comprised of the database “field”, and the rows are comprised of the database records. Shown below is an example listbox:



A: The column headers. Information contained within the listbox can be sorted alphabetically in ascending (i.e. A, B, C, D, E, etc) sequence and descending sequence (i.e. Z, Y, X, W, V) by clicking on the same column header a second time. Depending on how the listbox is configured, multi-column sorting might be possible (by clicking on the first listbox column that will be the primary sort, and hold the CTRL key down on the keyboard and left click on the second column to define the “sort within the sort”).

Whichever column is currently the “sort column” will determine how you search for information in the listbox. For example, if the “Recv’d From” column is current the sort column, and you press the letter “H” on the keyboard, the listbox highlight bar will be repositioned to the first database record that starts with the letter “H”.

B: The “listbox”, where database information is arranged in columns and rows.

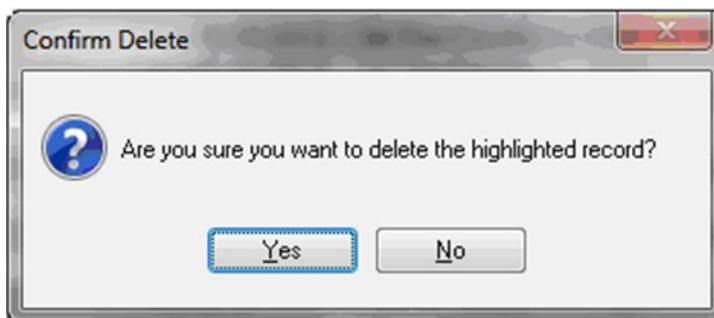
C: The “VCR” control area that uses the mouse to quickly move the highlight bar within the listbox. From left to right their functionality is:

1. Go to the top of the listbox (keyboard equivalent: CTRL-HOME).
2. Go up one screen within the listbox (keyboard equivalent: Pg Up).
3. Go up one database record (keyboard equivalent: Up Arrow).
4. Search within the listbox (note: might be disabled, depending on the listbox configuration).
5. Go down one database record (keyboard equivalent: Down Arrow).
6. Go down one screen within the listbox (keyboard equivalent: Pg Dn).
7. Go to the bottom of the listbox (keyboard equivalent: CTRL-END).

D: Add a new database record to the database.

E: Change the contents of the currently highlighted database record.

F: Delete the currently highlighted database record [NOTE: the record deletion is **PERMANENT!** A popup window will ask you to confirm whether you want to delete the record or not:



G: Displays the help file entry for this screen (keyboard equivalent: F1).

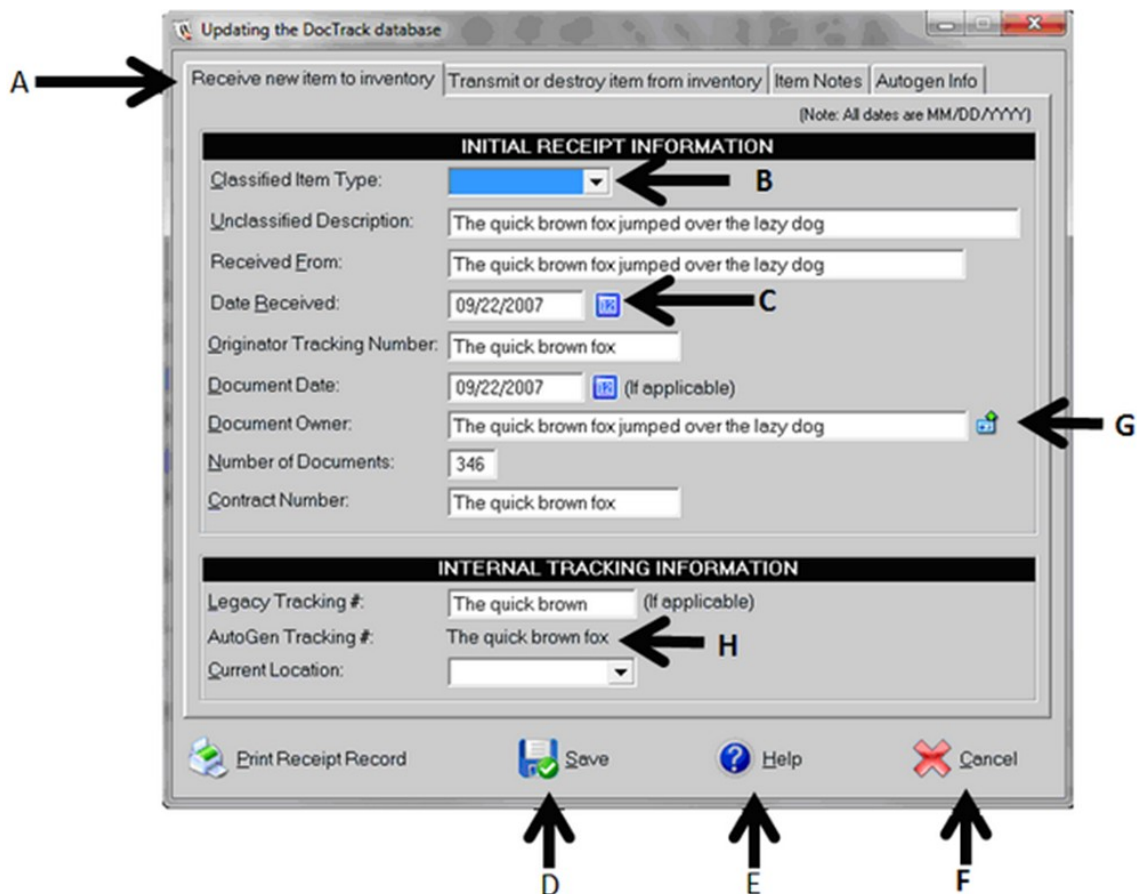
H. Close this window.

Normally, the listbox will display alternating colors for alternating rows to make the listbox easier to read the listbox.

Basics - Data Entry Screen

A “data entry screen” is used to add new information or edit existing database information. The screen consists of boxes (aka: an “entry field”) to enter information that will ultimately be stored inside of the database. Entry fields are usually grouped together in a logical manner (e.g. a business address). Sometimes an entry field will be

a mandatory entry and you can't save changes if that entry field is empty. If there are a lot of data entry fields, tabs might be used to reduce clutter and make the data entry screen easier to use if a large amount of information needs to be stored inside of a database record. To select a particular data entry field to add / edit its contents you can either left click the mouse inside of the desired data entry field, or hold down the ALT key on the keyboard and press the letter that is underlined inside of the text string that is displayed to the left of the data entry field. To move forwards through the data entry fields press the TAB key on the keyboard. To move backwards through the data entry fields hold down the SHIFT key and press the TAB key on the keyboard. Text fields normally will convert lowercase words into Proper Case words if the CAPSLOCK keyboard key is turned off (e.g. if you type in: this is a sentence the text will automatically be converted to: This Is A Sentence). Shown below is an example data entry screen with a variety of buttons to speed up data entry and / or ensure that only correct choices can be made inside the data entry field:



A: Tabs are used in this example data entry screen to consolidate data entry fields and simplify onscreen clutter. To navigate through the tabs you may either left click the mouse on the desired tab or, while holding down the CTRL key, press the TAB key to move forwards through the tabs.

B: A picklist is used for this data entry field to force you to select a pre-determined list of values to ensure database integrity. You can either use the mouse to left click on the down arrow to display the list of values, or if you are already familiar with the values, you can press the first letter of a value to automatically fill the data entry field with that predetermined value.

C: This data entry field stores a date value that is formatted as MM/DD/YYYY. You can click the calendar graphic (displayed to the right of the data entry field) to display a popup calendar to select a date, or you can enter the date (without the '/' characters) and press the TAB key to save the value and move to the next data entry field – the data entry field will automatically enter the '/' character for you when you press the TAB key (e.g. if you enter 092207, and then press the TAB key, the date entry field will automatically reformat the information you entered and store / display it as 09/22/2007).

D: The SAVE button will first verify that any data entry fields that can't be empty or have other data integrity rules applied (e.g. a date field can't be earlier than 06/26/1998) meet that data integrity condition – if the data integrity validation fails the data entry field that failed that validation will be highlighted; data will NOT be saved to the database and the data entry window will remain onscreen. If the validation passed the information will be saved to the database, the data entry window will close, and you are returned to the Browse Screen.

E: Displays the help file entry for this screen (keyboard equivalent: F1).

F: Close this window (after a popup window confirms that you really wanted to close this window) and abandon all database changes.

G: This icon signifies that there is a lookup (i.e. external) database assigned to this data entry field. This method of ensuring database integrity allows you to add / edit /change values stored in the lookup database (instead of forcing you to use a pre-defined list of values, as discussed above in item B). There are several ways of using this feature:

1. If you are already familiar with the lookup database, press the first few letter(s) of a value stored in the lookup database – if there is a matching entry contained in the lookup database, that entry will be retrieved from the lookup database and automatically entered in this data entry field. You can use the DEL key to remove characters that you typed into this data entry field to select a different lookup value (in case there are multiple values stored in the lookup database that are worded similarly).
2. Click on the icon to display the lookup browse screen window. Locate the desired lookup database record displayed in its listbox and then click the SELECT button to close the lookup browse window and insert the selected value into the data entry field.

3. Hold the ALT button on the keyboard and press the Down Arrow to display the data lookup window to locate / select the desired lookup database record and insert that value into the data entry field.

H: This is information that is being displayed on the data entry screen that cannot be edited.

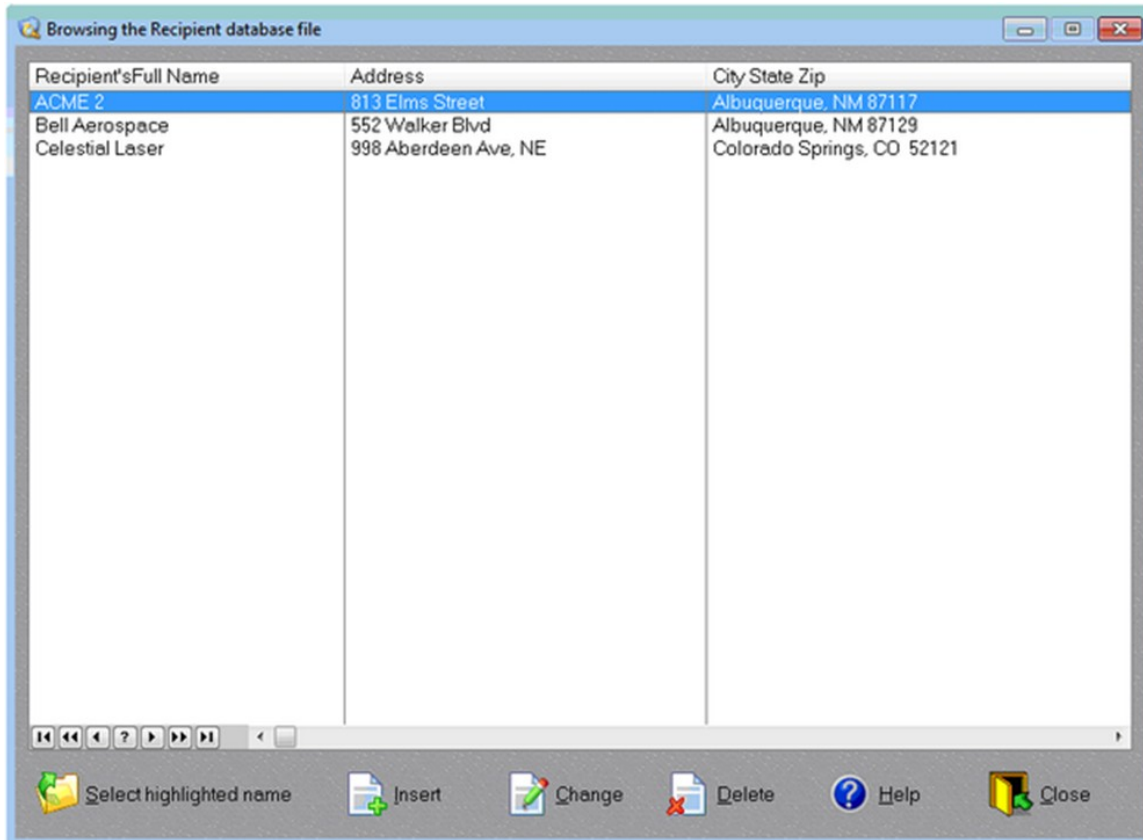
Basics - Lookup Table

A lookup table is used to ensure database integrity. For example, a lookup table could contain a list of states within the United States (i.e. AK; AL; AZ) or a list of cities that your business sells products to (e.g. Cincinnati; Detroit; Houston). Data integrity is especially important for reports – if a report is filtered on a particular city (e.g. All products sold in Houston), but you misspelled Houston in the database a couple of times (e.g. Hooston; Housston), then the report wouldn't contain all of the information needed to make an accurate business decision.

A lookup table also gives you the flexibility to dictate WHAT information is valid for a data entry field instead of the software developer trying to guess what values are valid today / in the future.

A lookup table's contents are accessible from the data entry screen from which it is accessed from. Oftentimes, the software application's Main Menu will have a menu option (usually found under the "Browse" main menu item) to access the Lookup Table's browse screen to add / edit / delete its contents.

A "lookup table" window is identical to a Browse Screen, with the addition of a button titled "**SELECT**" that appears when this window is requested from a data entry screen:



Clicking the 'SELECT HIGHLIGHTED NAME' button will insert the selected lookup information into the applicable data entry field after closing the lookup table window.

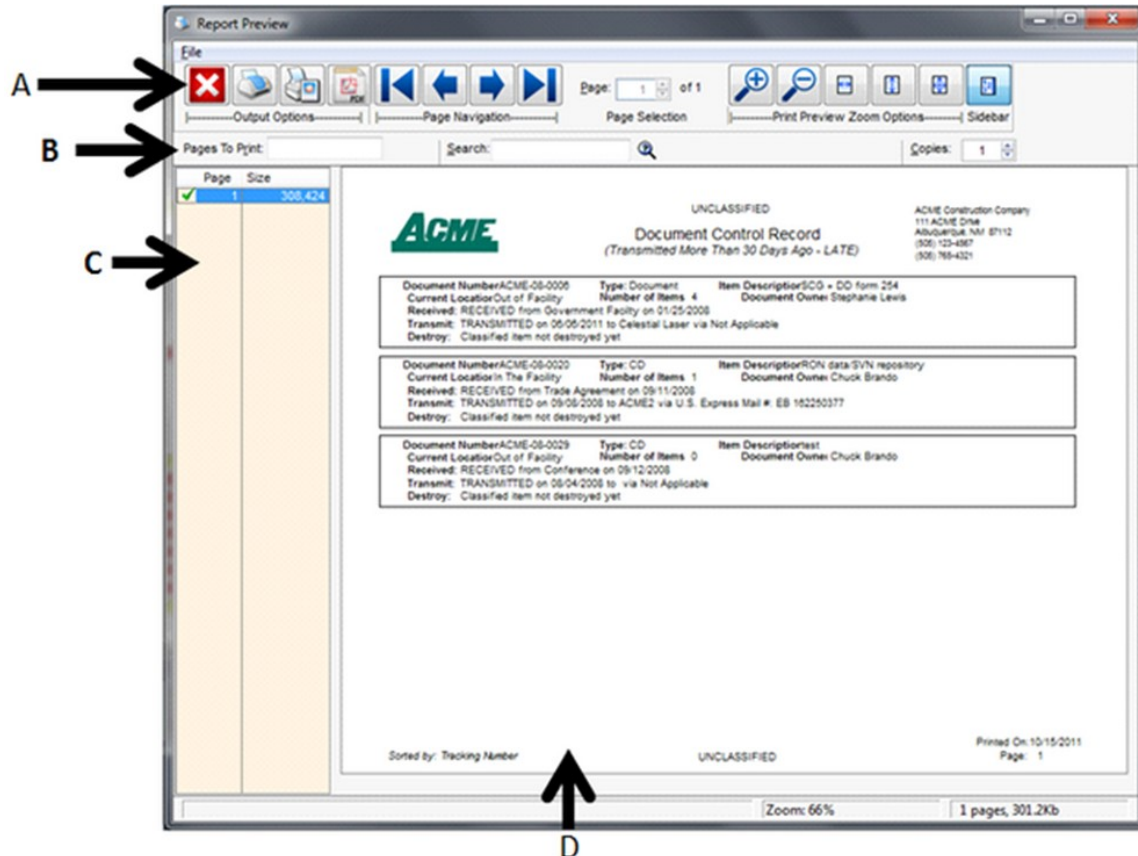
Basics - Reports

A report is a gathering of information stored within the software application's database file(s), carefully formatted / positioned, sometimes reformatted for readability (e.g. combine separate database fields for a customer's First Name and a Last Name), and then either displayed onscreen in a Print Preview screen or sent directly to a printer that is installed on your computer. A report **does not** alter / delete any information stored within the application's database file(s).

Depending on the complexity of the report, the time required to generate the report can range from a few seconds to a few minutes (especially if the database is large; your company's computer network is operating slowly; the report-building phase is conducting a large number of complex mathematical calculations or reformatting database fields for improved readability).

Basics - Print Preview Screen

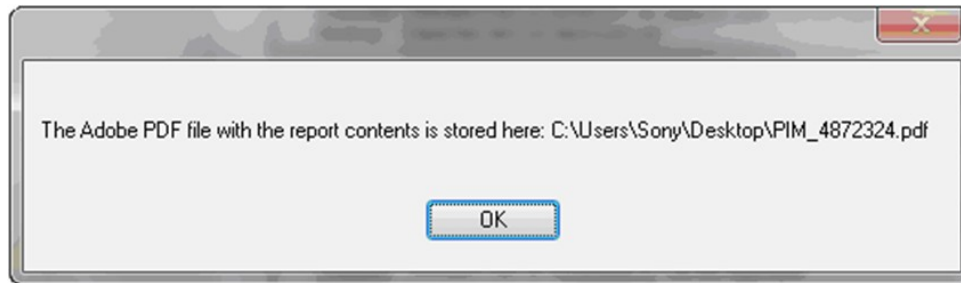
Application reports that aren't sent directly to a printer or to a file that is created, and then stored, on your computer's hard drive are sent to a Print Preview screen which allows you to view the report in its entirety without printing it; selectively print page(s) of the report; search for information in the report and other features. Shown below is an example print preview screen:



A: Primary Toolbar: This toolbar contains the majority of features that are available in this Print Preview engine. From left to right each button's functionality is:

1. Exit the print preview window; do not send the report to the printer.
2. Print the entire report; after being clicked, a popup window will appear onscreen that will allow you to select which printer (connected to your computer or available on your computer network) to send the report to. Depending on your printer's capabilities, you might be able to print a range of report pages and / or decide on the number of copies of the report to print.
3. Print only the currently displayed report page only. Depending on your printer's capabilities, you might be able to print a range of report pages and / or decide on the number of copies of the report to print.
4. Send all pages of the report to an Adobe Acrobat *.PDF file.

- a. Note 1: You do NOT need Adobe Acrobat Professional (or any other PDF generation printer driver) installed to use this feature. This application includes the ability to generate a *.PDF file.
- b. Note 2: The *.PDF file builds a unique temporary filename to ensure it doesn't overwrite an existing file.
- c. Note 3: The *.PDF file is generated to the Windows Desktop.
- d. Note 4: After the *.PDF file has been created a popup window will appear:



5. VCR control button to display the first page of the report.
6. VCR control button to display the previous page of the report.
7. VCR control button to display the next page of the report.
8. VCR control button to display the last page of the report.
9. An entry field to type in the page number of the report that you want to display onscreen. Alternatively, you can use the spin box (displayed immediately to the right of the data entry field) to move upwards or downwards within the report.
10. Display the report page in FULL WIDTH mode (horizontally fill the screen).
11. Display the report page in FULL HEIGHT mode (vertically fill the screen).
12. Display the report page with 100% zoom.
13. Toggle the PageList sidebar (C) on or off.

B: Secondary Toolbar This toolbar contains options for page selection / text search. From left to right each button's functionality is:

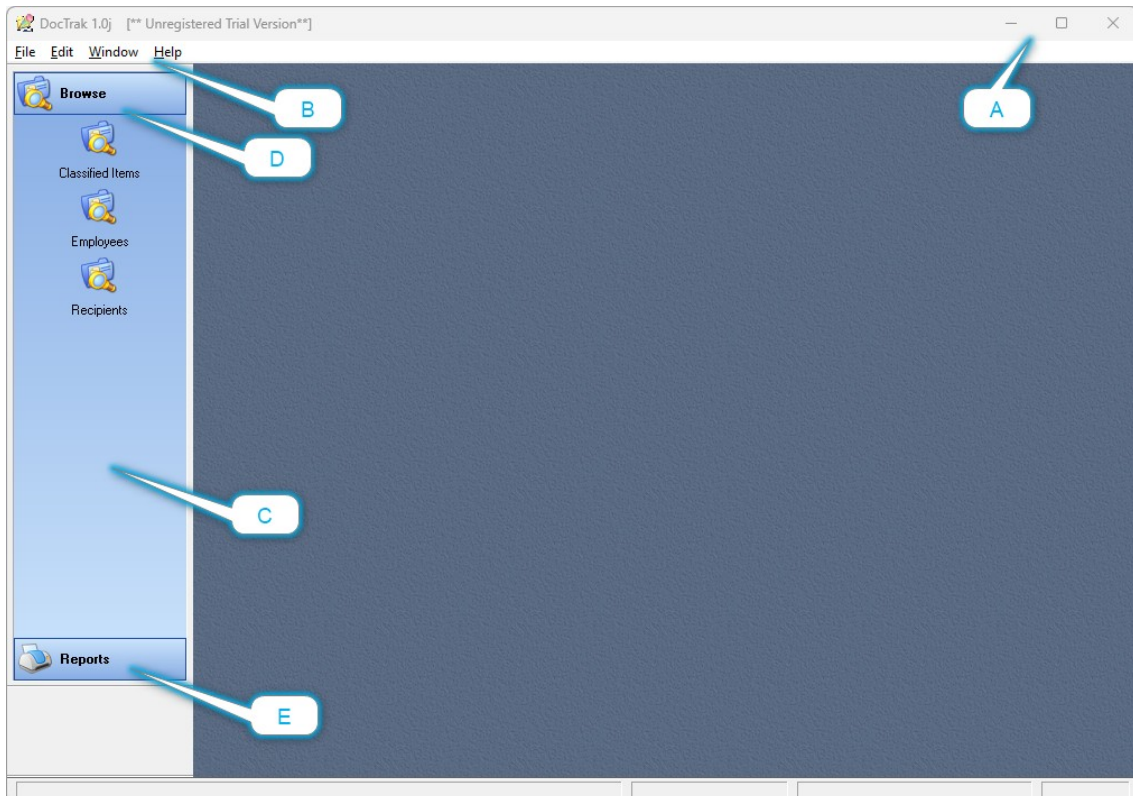
1. Enter a range of pages (e.g. 2-5) or individual pages separated by commas (1,4,5,6,9) to print in this data entry field.
2. Type in a word in this data entry field to search for text that is contained with a report page and then click the small GO button displayed to the right of the data entry field.
3. An entry field to type the number of copies of the report to print (or use the spinbox displayed at the right of the data entry field to increase or decrease the data entry field's value).

C: The sidebar displayed at the left of the Print Preview screen displays a list of all of the pages of the report. By default, all of the pages of the report are printed and displayed onscreen. To unselect a page to print, double left click the green checkmark – the green checkmark is changed into a red colored "X"; to re-select that page to print double left click the red colored "X" to select that page to print (and the red "X" reverts back to the green colored checkmark).

The Print Preview main window has a menu displayed at the top left of the window. Under the window's "File" menu option are two items – print the report and exit the Print Preview window.

Main Screen

The application's "main screen" is your interface to everything this software application can do. All application "sub" windows reside "inside" of the "main screen. This application's main screen looks like this:



A: These three buttons are found in nearly every Windows application; from left to right their functionality is:

1. Minimize this application to the Windows taskbar.
2. Toggle the Main Screen of this application from full screen to a portion of the screen.
3. Close this application

B: This is the application's main menu. You can select a main menu option by left clicking the mouse on one of the main menu's words (e.g. File; Edit; Window) or by holding down the ALT button on the keyboard and then press the underlined word of the desired main menu option (e.g. ALT-F). Once the main menu option has been

selected and displayed, you can use the arrow keys on the keyboard to navigate, and then select, a main menu's different options.

C: This is a sidebar that duplicates some of the application's main menu options using an interface popularized by the Microsoft Outlook application. Options displayed within the sidebar (also commonly known as the "Outlook Sidebar") are only accessible with the mouse. When the "title bar" labeled "Reports" is clicked, the "Browse Title Bar" will collapse and the "Reports Title Bar" will expand (and vice versa).

D: This is the "Browse" portion of the sidebar that is automatically opened with the Main Screen is opened. The three items displayed are buttons that, when clicked, will execute that Browse procedure.

E: This is the "Report" portion of the sidebar that, when clicked, will display buttons that, when clicked, will execute that Report procedure.

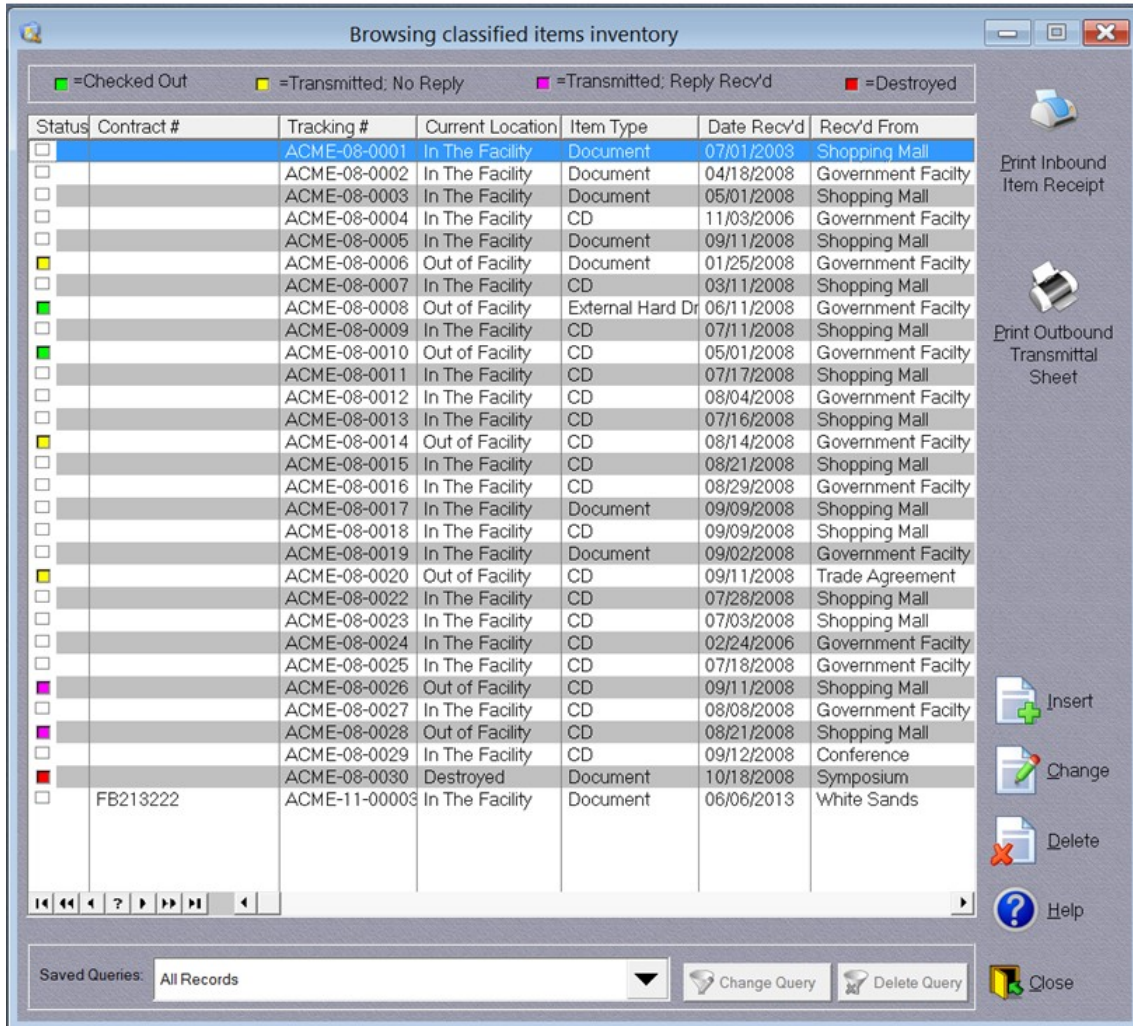
The application's Main Screen can be resized to any desired size by placing the mouse cursor at one of the window's four corner; the mouse cursor will change from a pointer to a double arrow (note: if you have customized your Windows theme the mouse cursor might be something different in appearance; regardless, the mouse cursor will change shape) – while holding down the left mouse button, you will drag the window in the desired direction to resize the application's window – once the application's window is the desired size release the left mouse button.

The 'Report's section of the sidebar menu resembles this:



Browse Document Database

This browse screen uses the principles that are described in the "Basics – Browse Screen" portion of this help file / user's manual:



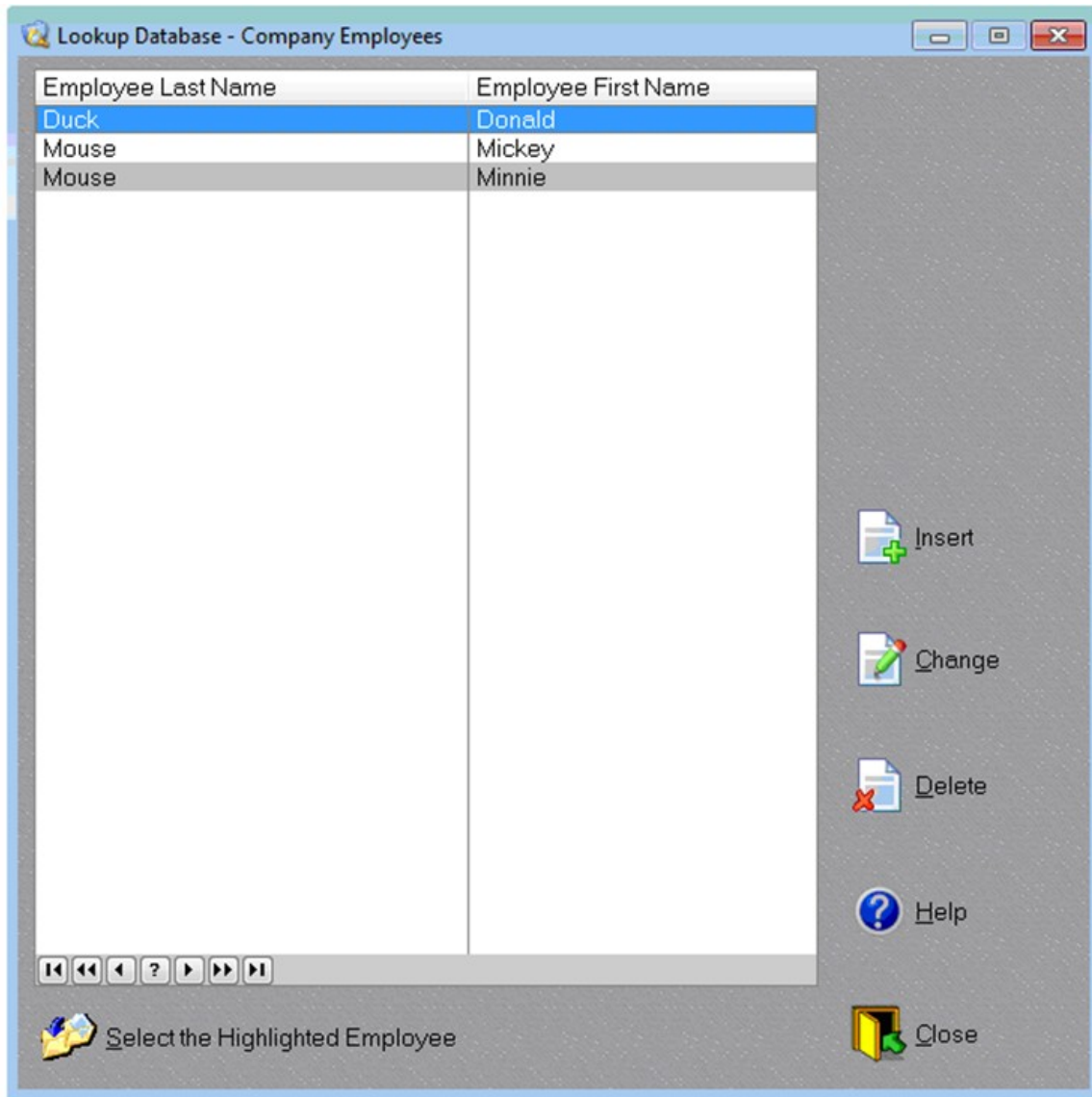
This screen is your primary interface to manage your company's classified holdings.

This screen allows you to:

- Add a new classified holding (e.g. computer media; document) to the application's database.
- Edit an existing database entry.
- Permanently delete a database record.
- By creating or selecting an existing query, you can 'filter' information displayed onscreen that meets your filter criteria (e.g. show only classified holdings that have been transmitted but no delivery receipt has been received)
- View the contents of the classified holdings database in a columnar format. You can sort the information in a variety of ways.
- Print an "Inbound Item Receipt" document to help you manage your classified holdings in an unclassified environment.
- Print an "Outbound Transmittal Sheet" if a classified holding has to leave your facility (e.g. a classified business meeting; destruction).

Browse Employee Lookup Database

This browse screen uses the principles that are described in the [“Basics – Browse Screen”](#) portion of this help file / user’s manual:



Two columns of information are displayed from the “Employee” database: the employee’s last name and the employee’s first name. If this screen is called from a data entry screen, the bottom left button titled “Select the Highlighted Employee” will be visible to insert the currently highlighted listbox entry into the data entry screen field.

Browse Recipient Lookup Database

This browse screen uses the principles that are described in the [“Basics – Browse Screen”](#) portion of this help file / user’s manual:

Recipient's Full Name	Address	City State Zip
ACME 2	813 Elms Street	Albuquerque, NM 87117
Bell Aerospace	552 Walker Blvd	Albuquerque, NM 87129
Celestial Laser	998 Aberdeen Ave, NE	Colorado Springs, CO 52121

Three columns of information are displayed from the “Recipients” database: the Recipient’s full name and their street address and city / state zip code. If this screen is called from a data entry screen, the bottom left button titled “Select highlighted name” will be visible to insert the currently highlighted listbox entry into the data entry screen field.

Form - Classified Item Info

This data entry form uses the principles that are described in the “Basics – Data Entry Screen” portion of this help file / user’s manual. This data entry screen uses four tabs to segregate data into more manageable groups and is used to add / edit information stored inside of the document database:

Editing existing classified item info (ACME-08-0012)

Receive new item to inventory | Transmit or destroy item from inventory | Item Notes | Autogen Info

(Note: All dates are MM/DD/YYYY)

INITIAL RECEIPT INFORMATION

Classified Item Type:

Unclassified Description:

Received From:

Date Received:

Originator Tracking Number:

Document Date: (If applicable)

Document Owner:

Number of Documents:

Contract Number:

INTERNAL TRACKING INFORMATION

Legacy Tracking #: (If applicable)

AutoGen Tracking #:

Current Location:

The above data entry screen tab provides eleven data entry fields pertaining to the INITIAL RECEIPT of the classified item(s) and INTERNAL TRACKING information. A description of each of the database fields:

1. Classified Item Type: Use the picklist of available choices to describe the item; available choices are:
 - a. CD
 - b. Document
 - c. DVD
 - d. External Hard Drive
 - e. Floppy
 - f. Other
 - g. Thumbdrive
 - h. Zip Disk
2. Unclassified Description: Enter an UNCLASSIFIED description of the classified item(s) that your facility received / generated internally.

3. Received From: Enter the name of the company / individual that provided your facility with the classified item(s).
4. Date Received: Enter the date (MM-DD-YYYY format) that your facility received / generated the classified item(s). You can use the popup calendar feature to select a date or use the keyboard to enter the date value.
5. Originator Tracking Number: If the classified item(s) originated from an external entity, and the classified item(s) have a tracking number used by the originator, you can enter that information here to help track the item(s).
6. Document Date: If the classified item(s) have a date written / typed onto the item(s), enter that information here.
7. Document Owner: Enter the name of the employee that will most often use the classified item(s) once received by your facility.
8. Number of Documents: Enter the number of item(s) that the classified item(s) you are receiving into your classified holdings here (e.g. an employee creates a classified briefing and prints a hard copy that they want stored in your facility's GSA approved container – enter the TOTAL number of printed pages here).
9. Contract Number: If applicable, enter the contract number that the classified item(s) were generated under.
10. Legacy Tracking #: If you already have a tracking number assigned to this classified item (via an older tracking database or spreadsheet) you may enter that information here to preserve that legacy information.
11. Current Location: Use the picklist of available choices to describe where the classified item(s) assigned to this Autogen Tracking Number are currently located. The available choices are:
 - a. Destroyed
 - b. In The Facility
 - c. Out of Facility

Note: You cannot edit the internally generated "Autogen Tracking #" – this number is displayed on this data entry screen in READ ONLY mode to assist you with tracking this item within your facility.

[NOTE: do NOT enter classified information in any of these data entry fields!]

Editing existing classified item info (ACME-08-0012)

Receive new item to inventory Transmit or destroy item from inventory Item Notes Autogen Info

TRANSMITTAL INFORMATION

Transmit Method: Not Applicable Details:

Date Transmitted: 00/00/0000

Recipient's Name:

Street Address: City, State, Zip: Albuquerque, NM

Date Received: 00/00/0000

CHECKOUT INFORMATION

Checked Out? Checked Out To?

Destination: Return Suspense Date: 00/00/0000

Checkout Purpose:

DESTRUCTION INFORMATION

Destruction Date: 00/00/0000

Destroyed By?

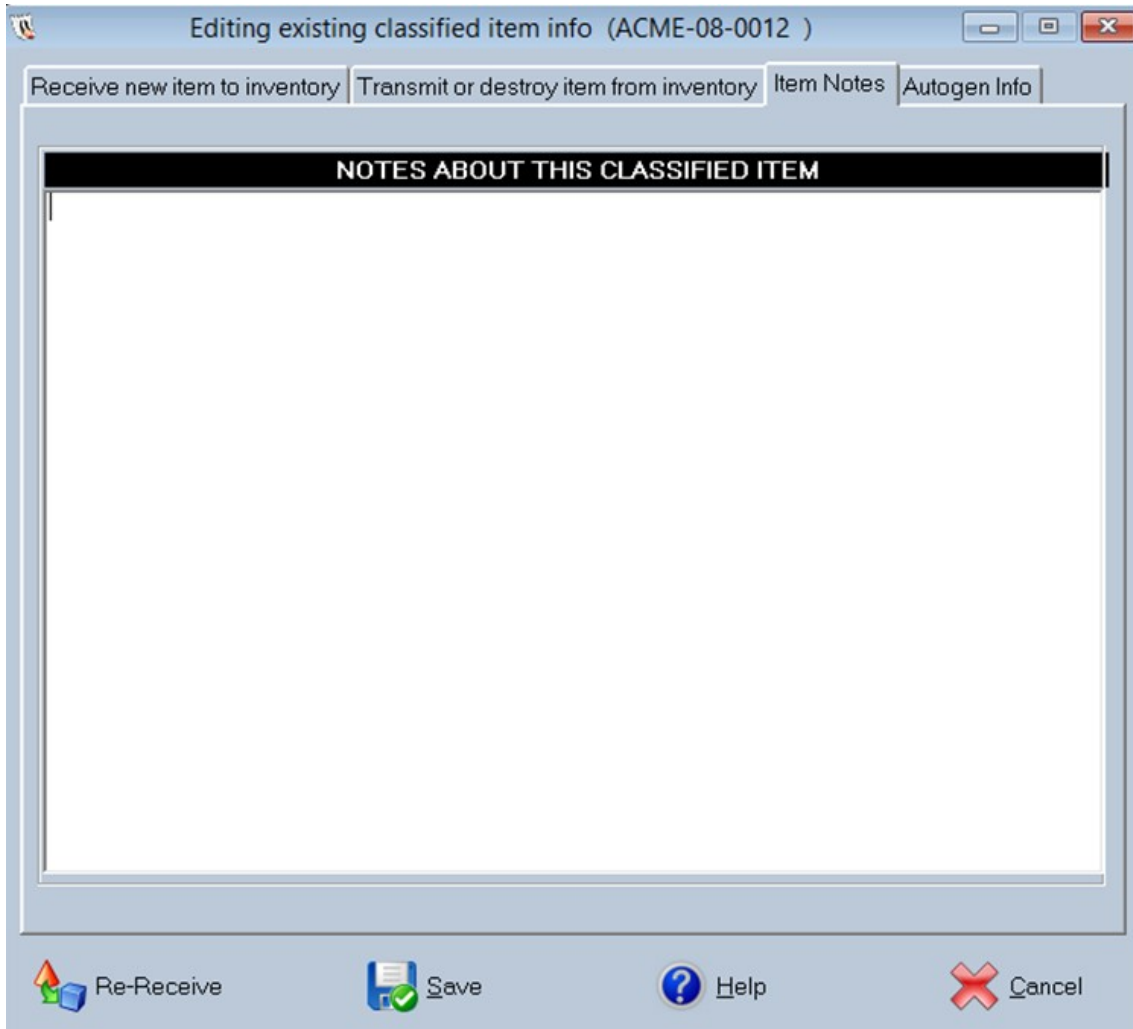
Destruction Method: Not Applicable

The above data entry screen tab provides seven data entry fields pertaining to TRANSMITTAL INFORMATION (e.g. you sent classified items to be destroyed to another location), five data entry fields pertaining to CHECKOUT INFORMATION, and three data entry fields pertaining to DESTRUCTION INFORMATION. A description of each of the database fields:

1. Transmit Method: Use the picklist of available choices to describe how the item(s) were transmitted out of your facility to an authorized destination; available choices are:
 - a. Not Applicable
 - b. Handcarried By
 - c. U.S. Express Mail #
 - d. U.S. Registered Mail #
 - e. FedEx #
2. Details: You can provide additional Transmit Method details in this entry field (e.g. the tracking number provided by the USPS for the parcel can be entered

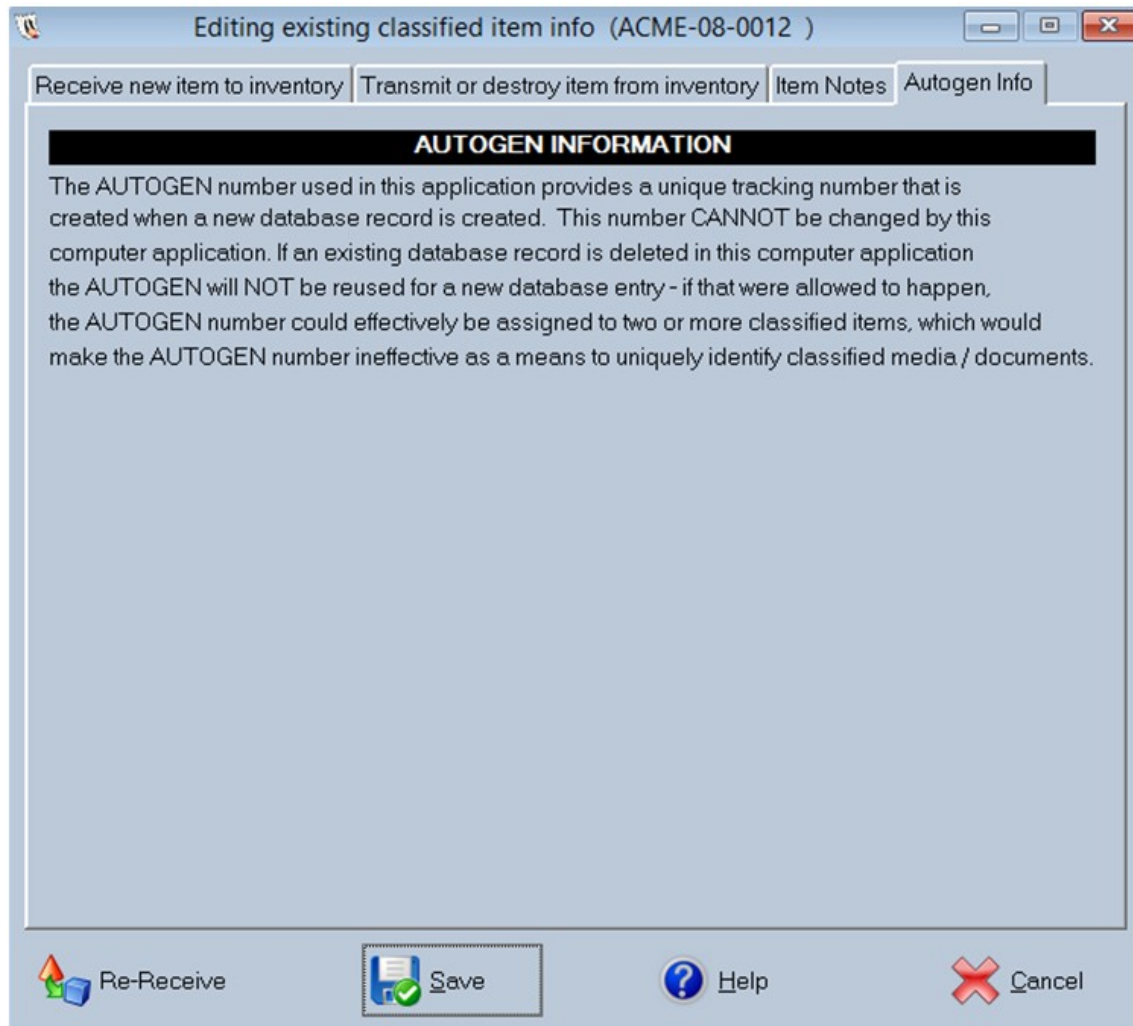
- here).
3. Date Transmitted: The date the parcel was transmitted outside of the facility.
 4. Recipient's Name: The full name of the individual that the classified parcel was transmitted to. Adjacent to this data entry field is a lookup button.
 - a. Note: After a recipient is chosen from the lookup button there are two fields that are automatically updated:
 - i. DOC:TransmitAddress = REC:Address
 - ii. DOC:TransmitCityStateZip = REC:CityStateZip
 5. Street Address: The street address of the facility that you transmitted the classified parcel to.
 6. City, State, Zip Code: The city, state, and zip code of the facility that you transmitted the classified parcel to.
 7. Date Received: The date the facility that you transmitted the classified parcel to received the parcel.
 8. Checked Out: This is a true/false checkbox. If checked, it means the item was checked out / loaned to a destination outside of your facility and expected to return by an agreed upon date (e.g. an offsite meeting).
 9. Checked Out To: The name of the individual (usually an employee) that was provided the classified item to take outside of the facility.
 10. Destination: The name of the company / DoD facility that the classified item was taken to from your facility.
 11. Return Suspense Date: The agreed upon date that the checked out / loaned item will be returned to your facility.
 12. Checkout Purpose: Enter the reason why this classified item was taken out of your facility (e.g. a classified meeting; a classified symposium).
 13. Destruction Date: The date the classified parcel that you transmitted was destroyed.
 14. Destroyed By: The name of the individual that destroyed the parcel. A data lookup of facility employees is available for this data entry field.
 15. Destruction Method: Use the picklist of available choices to describe how the item(s) were destroyed outside of your facility; available choices are:
 - a. Not Applicable
 - b. Government Site
 - c. Incinerator
 - d. Returned to Owner
 - e. Shredder Off-Site

[NOTE: do NOT enter classified information in any of these data entry fields!]



The above data entry screen tab allows you to enter notes about the classified item(s) that pertain to this DocTrak database entry.

[NOTE: do NOT enter classified information in the notes field!]



The above data entry screen tab only provides information on what an AUTOGEN number is (aka: the unique tracking number used by DocTrak to identify each classified item within the DocTrak database). No information can be entered on this tab.

Note: When the SAVE button is clicked the following validation occurs:

! If the item is checked out ensure that the location is "Out of Facility"

if clip(DOC:Checkedout) <> 0 OR DOC:TransmitDate > 0

 DOC:CurrentLocation = '**Out of Facility**'

end

! Ensure that the location of this asset is "In the Facility" if dates are blanked

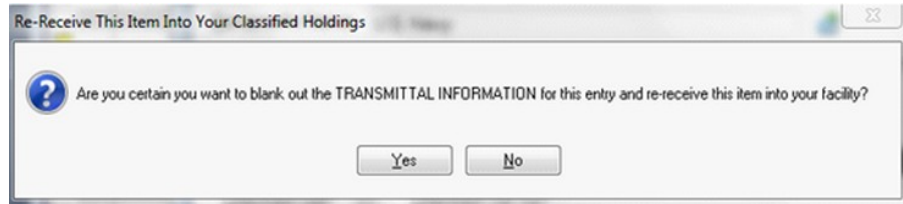
if (DOC:DestructDate = 0) AND (DOC:TransmitDate = 0) AND DOC:Checkedout = 0

 DOC:CurrentLocation = '**In The Facility**'

end

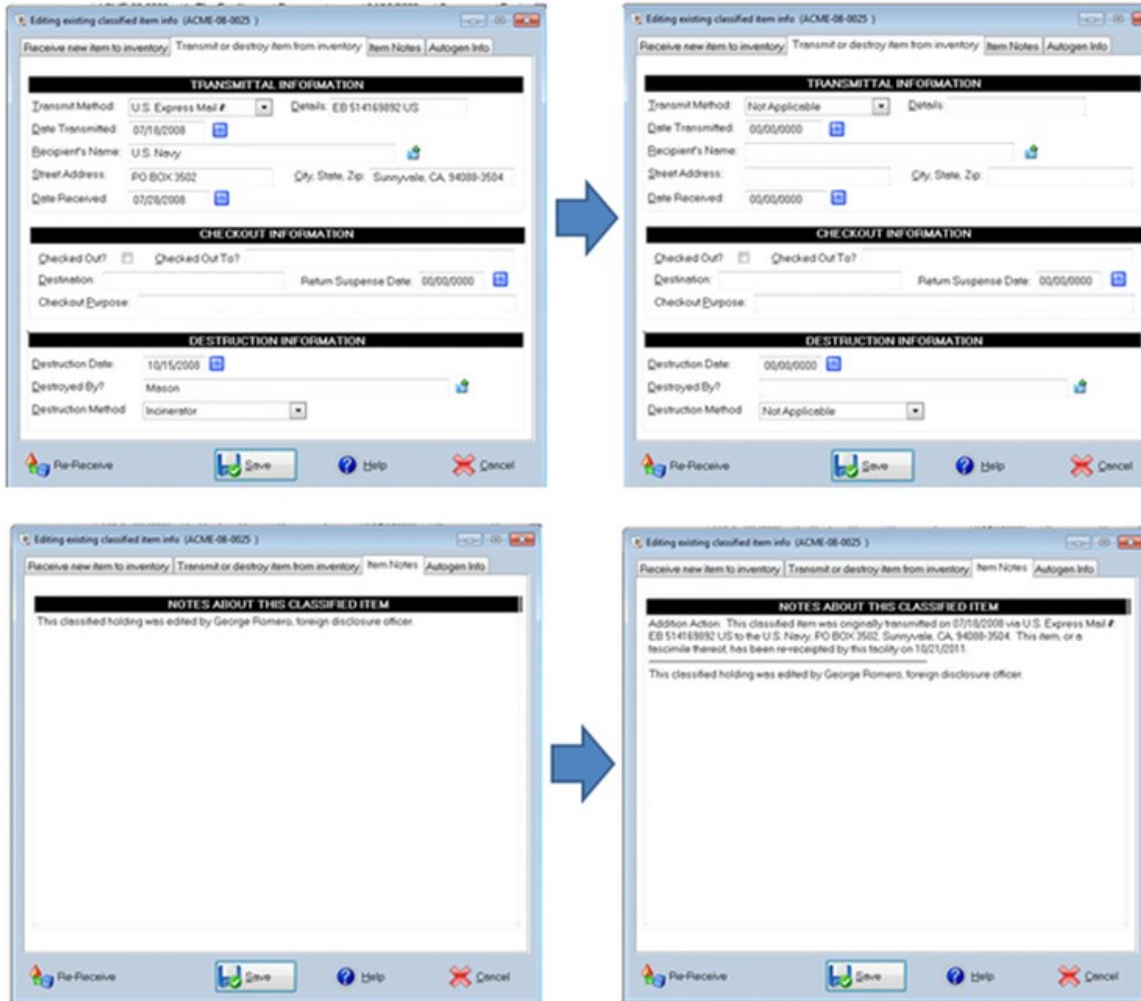
Note: The Re-Receive button has a specialized use. In the rare instance where your facility has transmitted a classified holding out of the facility, and at a later date you receive it back, this button will wipe out the contents of all of the data entry fields located on the second tab, and then add a notes entry that documents the previous transmittal information for that item to formally document the previous transmittal. The sequence of events when that button is clicked is:

- a. The re-receive button is clicked
- b. A popup message box appears onscreen:



- c. If the NO button is clicked nothing is altered on the second or third tab.
- d. If the YES button is clicked the Date Transmitted database field is checked; if the date is empty no data is altered on the second or third tab; otherwise, all of the information on the second tab is wiped out; the Notes field on the third tab will have a new entry added above any existing notes that captures the transmittal information to serve as a document trail.

For example, here are the BEFORE and AFTER screens after answering YES to the popup message box asking if you want to re-receive this item into your facility:



Form - Company Employees

This data entry form uses the principles that are described in the "Basics – Data Entry Screen" portion of this help file / user's manual:

The screenshot shows a form titled "Edit an existing company employee". It features two text input fields:

- Employee's Last Name: Mouse
- Employee's First Name: Mickey

At the bottom of the form, there are three buttons: "Save" (with a green checkmark icon), "Help" (with a question mark icon), and "Cancel" (with a red X icon).

This data entry screen is used to add / edit information stored inside of the "Employee" lookup database. This employee would be the Point of Contact within your company

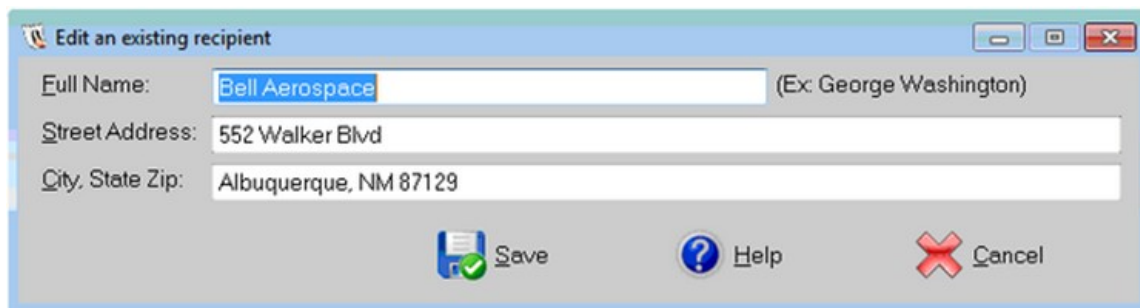
that would either use a classified item that is received by your company (e.g. a DVD disc); created the classified item (e.g. a hardcopy PowerPoint presentation), or brought the classified item back to your company (e.g. from a conference or symposium)

There are two data entry fields for this data entry screen:

1. Employee's last name: self-explanatory.
2. Employee's first name: self-explanatory.

Form - Recipients

This data entry form uses the principles that are described in the "Basics – Data Entry Screen" portion of this help file / user's manual:



The screenshot shows a window titled "Edit an existing recipient". It contains three text input fields. The first field is labeled "Full Name:" and contains the text "Bell Aerospace". To the right of this field is a hint "(Ex: George Washington)". The second field is labeled "Street Address:" and contains "552 Walker Blvd". The third field is labeled "City, State Zip:" and contains "Albuquerque, NM 87129". At the bottom of the window are three buttons: "Save" (with a floppy disk icon), "Help" (with a question mark icon), and "Cancel" (with a red X icon).

This data entry screen is used to add / edit information stored inside of the "Recipients" lookup database – a "Recipient" is a facility that would receive classified information from your facility (e.g. a meeting; destruction).

There are three data entry fields for this data entry screen:

1. Full name of the company / person that will receive the classified item(s) from your facility when transmitted.
2. The recipient's street address.
3. The recipient's city, state, and zip code.

This data entry form uses the principles that are described in the "Basics – Data Entry Screen" portion of this help file / user's manual.

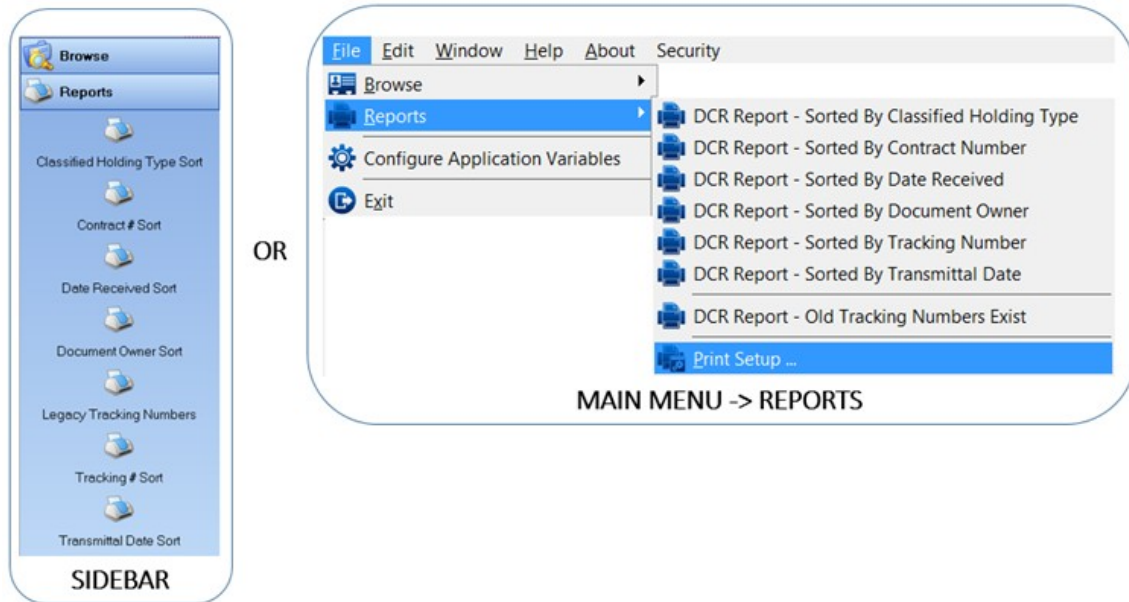
This data entry screen is used to add / edit information stored inside of the "Recipients" lookup database – a "Recipient" is a facility that would receive classified information from your facility (e.g. a meeting; destruction).

There are three data entry fields for this data entry screen:

1. Full name of the company / person that will receive the classified item(s) from your facility when transmitted.
2. The recipient's street address.
3. The recipient's city, state, and zip code.

Report - Reporting Options

You can execute a DocTrak report via the sidebar or the application's main menu:



The sidebar reports are identical to the main menu reports; here is a table that depicts their relationship:

SIDEBAR REPORT NAME	MAIN MENU REPORT NAME	REPORT SORT ORDER
Classified Holding Type Sort	DCR Report - Sorted By Classified Holding Type	Classified Item Type: <input type="text" value="CD"/>
Contract # Sort	DCR Report - Sorted By Contract Number	Contract Number: <input type="text"/>
Date Received Sort	DCR Report - Sorted By Date Received	Date Received: <input type="text" value="08/29/2008"/>
Document Owner Sort	DCR Report - Sorted By Document Owner	Document Owner: <input type="text" value="Joe Motron"/>
Legacy Tracking Numbers	DCR Report - Old Tracking Numbers Exist	Legacy Tracking #: <input type="text" value="ACME_000-111"/> (If applicable)
Tracking # Sort	DCR Report - Sorted By Tracking Number	AutoGen Tracking #: <input type="text" value="ACME-08-000016"/>
Transmittal Date Sort	DCR Report - Sorted By Transmittal Date	Date Transmitted: <input type="text" value="00/00/0000"/>

The report titled "Legacy Tracking Numbers" (or "DCR Report - Old Tracking Numbers Exist") is different from the other six reports. This report prints a list of all DocTrak database entries where an old tracking number has been entered for that classified holding - in other words, if you've entered information into this data entry field:

Legacy Tracking #: (If applicable)

then this report will capture that information and print it onto the report; if that data entry field is empty, then that database record will be 'skipped' and not included on the printed page. This report cannot have a query applied before the report is generated to the print preview screen (unlike the other six reports).

The remaining six reports are identical in two ways:

1. They can have a query applied before the report is generated to the print preview screen to limit output.
2. The layout of the report is identical.

The difference between these six reports is how the data is sorted before the report is generated to the print preview screen. The bottom left corner of each report is also different, as that report area displays the sort order of that report.

Report - DCR Filtered Report

This report uses the standard DocTrak Print Preview screen to display the report and provide you with options for saving the report as an Adobe Acrobat *.PDF file, number of copies to print, page(s) to print, and which printer to send the report to.

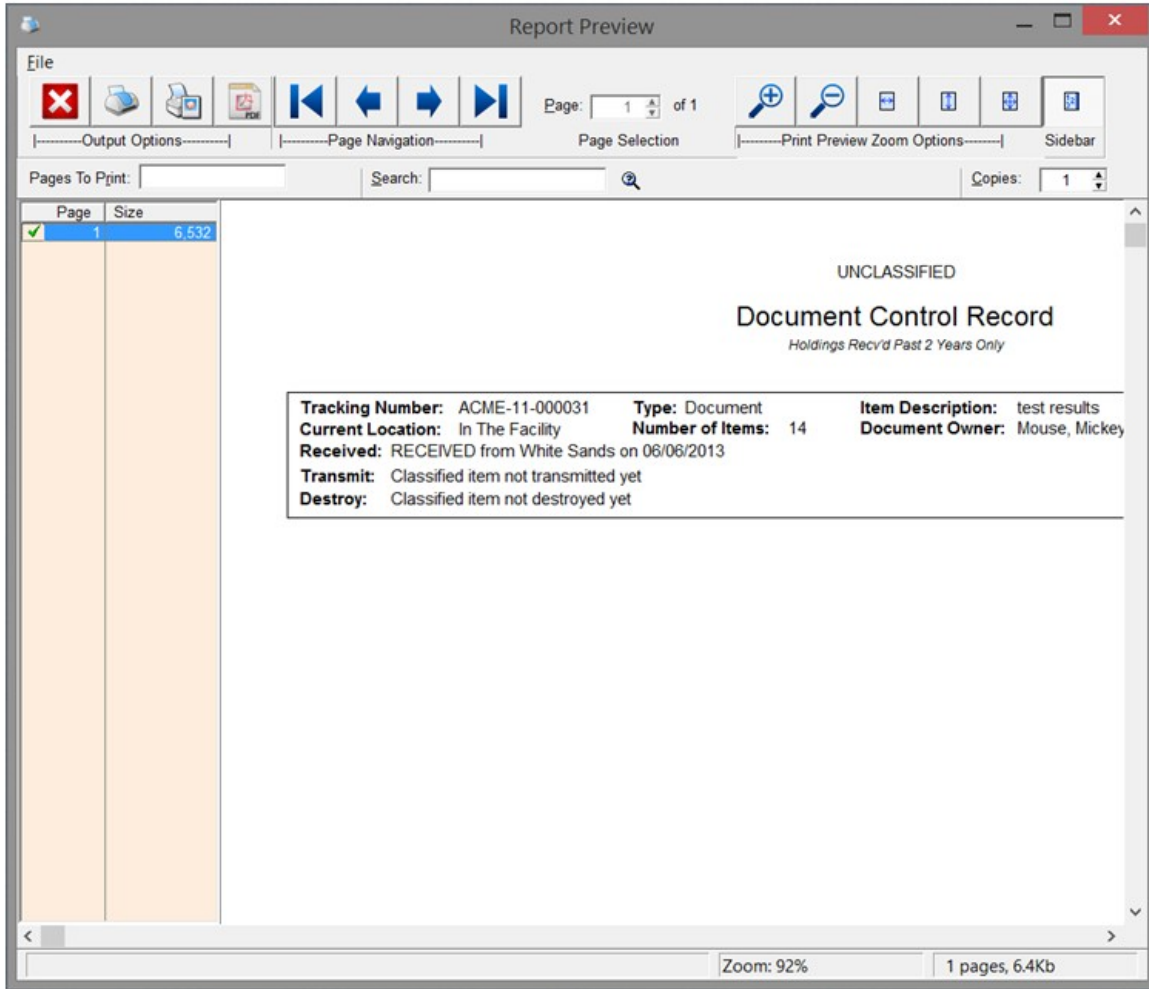
This report is generated from either the application's Main Menu or the application's Outlook SideBar (as a clickable sidebar button).

This single report contains all information needed to manage:

- o Classified holdings currently within your facility
- o Classified holdings that have been destroyed
- o Classified holdings that have been transmitted but the receipt has not yet been received
- o Classified holdings that have been transmitted and the receipt has been received
- o Any other possible reporting need!

The reason this report is so versatile because the Query Wizard is called prior to the report being generated - the query wizard filters database records that are ultimately generated to the report - and because you are in full control of how the query/filter is defined YOU are in control of what is generated into the report!

Shown below is the DCR report; the active query (in this example, the query titled 'Holdings Recv'd Past 2 Years Only' was used to limit the report's contents to that data subset:



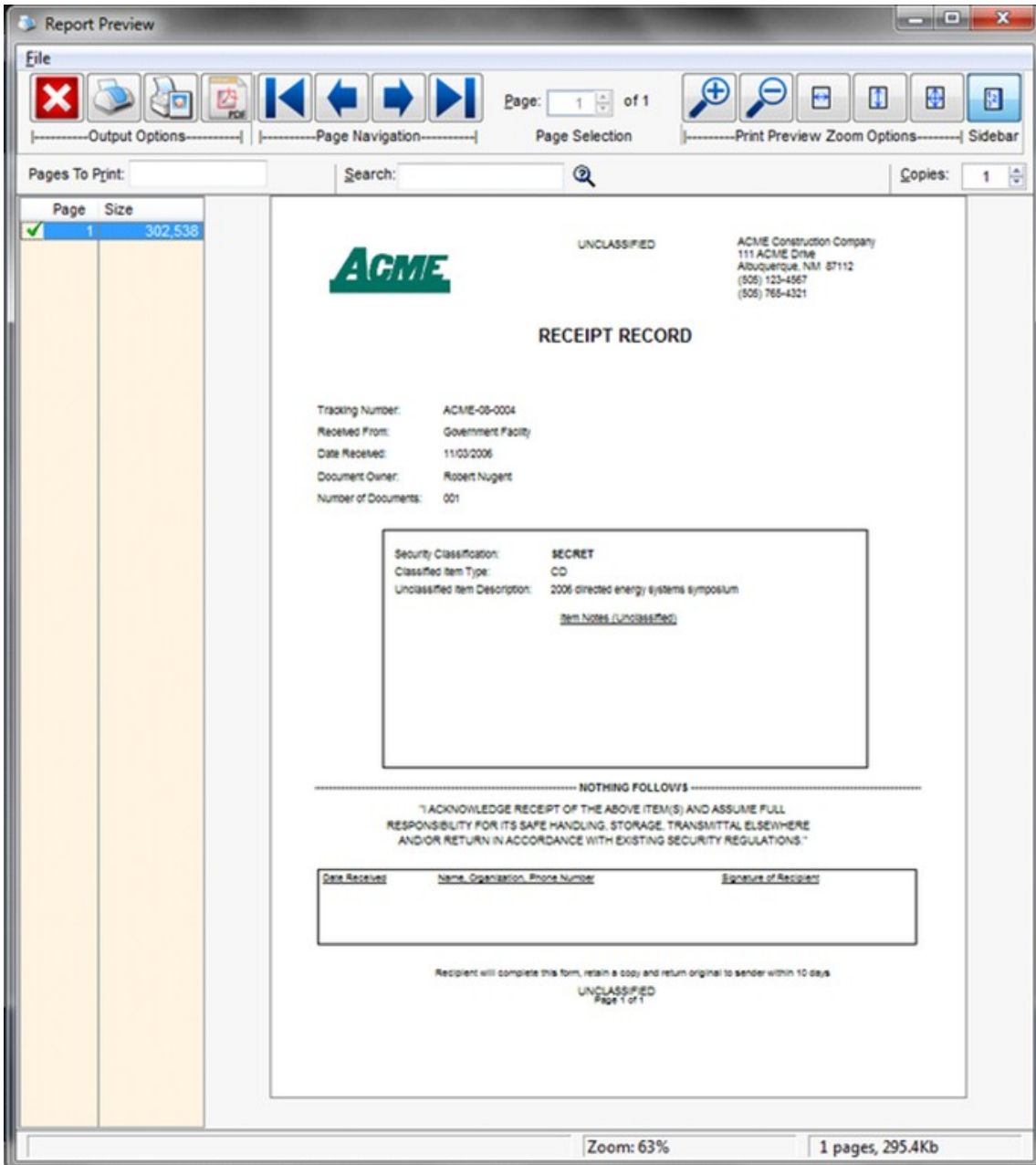
Report - Inbound Item Receipt

This report uses the standard DocTrak Print Preview screen to display the report and provide you with options for saving the report as an Adobe Acrobat compatible *.PDF file, number of copies to print, page(s) to print, and which printer to send the report to.

This report is generated only from the Browsing Classified Items Inventory browse screen – whichever database record is highlighted within that screen’s listbox will be used to generate this report, which displays that single DocTrak database record in a highly formatted report form.

This report is used by a Facility Security Officer (FSO) to document a classified item being introduced into their facility. The classified item must be placed inside of a GSA approved container within their closed room – not very conducive to managing classified holdings when the FSO works in an unclassified environment. This report, which is UNCLASSIFIED, can be maintained in the FSO’s office in a folder or binder, and can also be provided to a Defense Security Service (DSS) inspector without creating security incident.

This “snapshot” styled report is approximately one printed page (front side only) in length. The bottom portion of the form is dated / filled out / signed when the classified item is introduced into the facility.



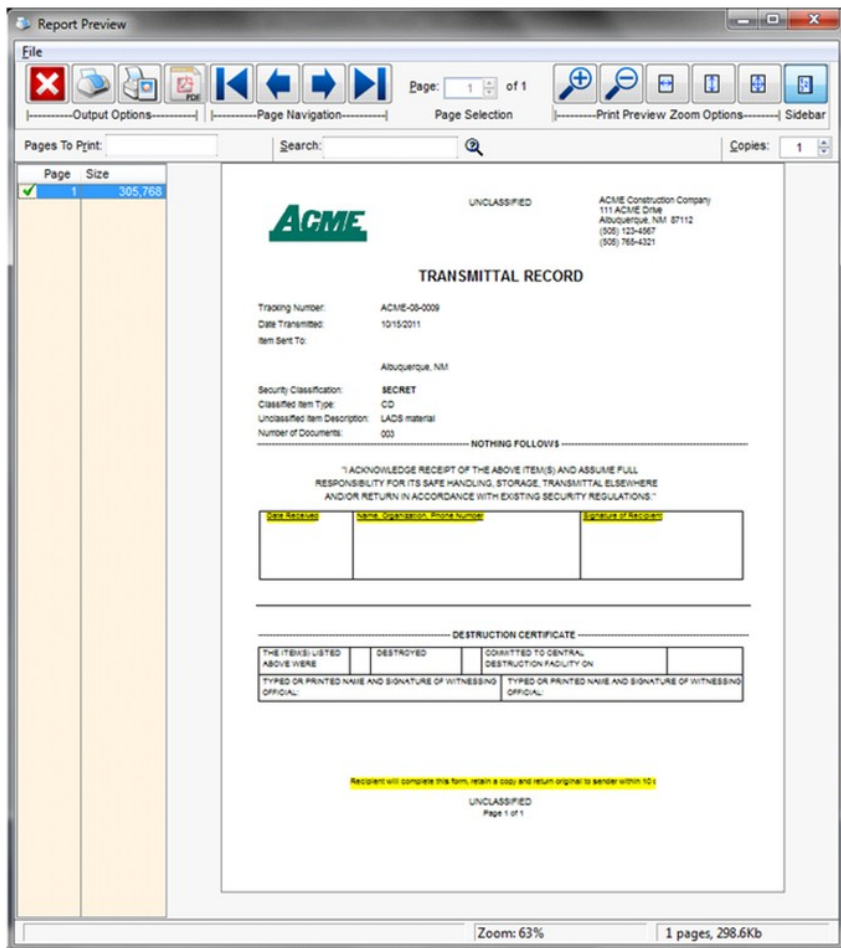
Report - Outbound Transmittal Sheet

This report uses the standard DocTrak Print Preview screen to display the report and provide you with options for saving the report as an Adobe Acrobat *.PDF file, number of copies to print, page(s) to print, and which printer to send the report to.

This report is generated only from the Browsing Classified Items Inventory browse screen – whichever database record is highlighted within that screen’s listbox is used to generate this report, which displays that single DocTrak database record in a highly formatted report form.

This report is used by a FSO to document a classified item being transmitted (i.e. “sent”) outside of their facility (most typically when the classified item is being sent back to its originator for destruction). This document is printed dated / filled out / signed by the FSO (aka: the highlighted areas of the form) in the middle of the document and then placed into the same parcel as the classified item(s) when sent to its approved destination. When the addressee receives the classified parcel, they will date / fill out / sign this document when the classified item is received / destroyed and then mail the document back to your company to acknowledge receipt / destruction of the classified item(s).

This “snapshot” styled report is approximately one printed page (front side only) in length. The bottom portion of the form is dated / filled out / signed when the classified item is introduced into the facility.

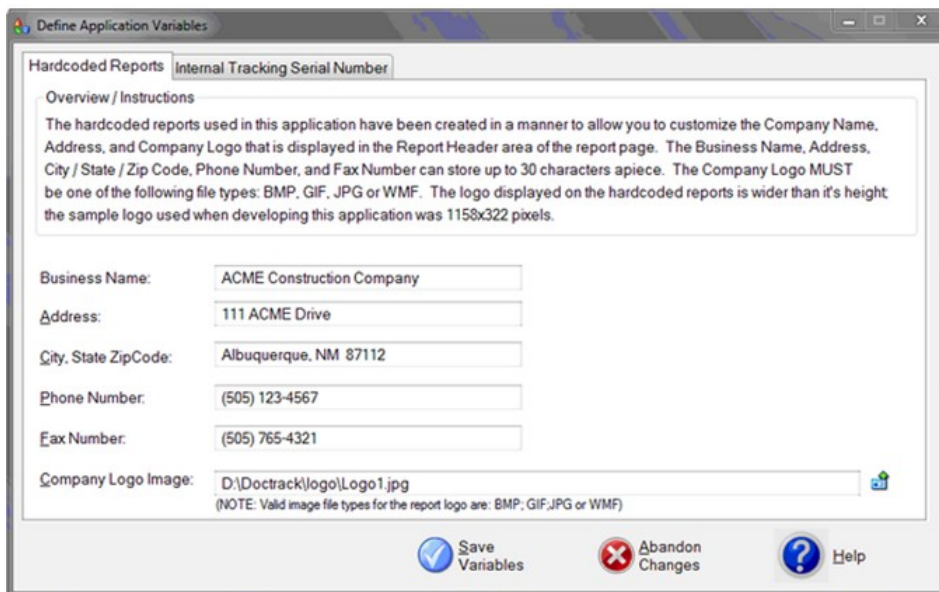


Configuration

This screen contains two tabs to configure how information is printed on the DCR reports (tab #1) and the internal tracking number is created when a new classified item is entered into the DocTrak database (tab #2).

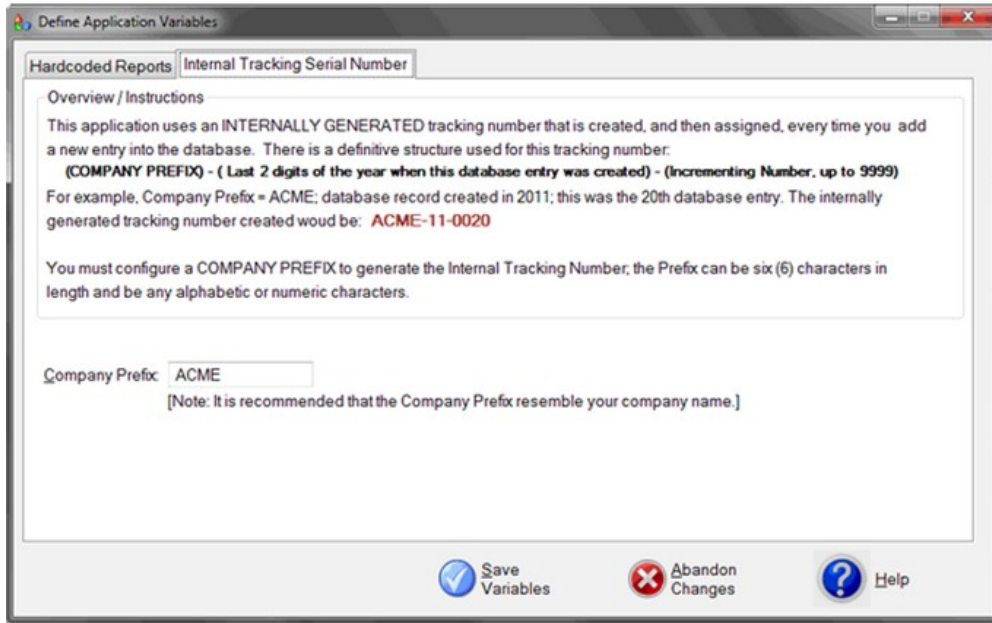
Tab #1 contains five entry fields to enter YOUR company's name, street address, city, state, and zip code plus it's phone number and fax number. The last entry field is used to select your company's logo file (stored ideally in the same location as the DocTrak software application). The image file MUST be saved in one of four graphics file types: *.BMP, *.GIF, *.JPG or *.WMF.

The first five entry fields are printed in the top right corner of the DCR reports; the sixth entry field displays the company logo at the top left corner of the DCR report:



The screenshot shows a window titled "Define Application Variables" with two tabs: "Hardcoded Reports" and "Internal Tracking Serial Number". The "Internal Tracking Serial Number" tab is active. It contains an "Overview / Instructions" section with the following text: "The hardcoded reports used in this application have been created in a manner to allow you to customize the Company Name, Address, and Company Logo that is displayed in the Report Header area of the report page. The Business Name, Address, City / State / Zip Code, Phone Number, and Fax Number can store up to 30 characters apiece. The Company Logo MUST be one of the following file types: BMP, GIF, JPG or WMF. The logo displayed on the hardcoded reports is wider than it's height the sample logo used when developing this application was 1158x322 pixels." Below the instructions are several input fields: "Business Name:" with the value "ACME Construction Company"; "Address:" with "111 ACME Drive"; "City, State ZipCode:" with "Albuquerque, NM 87112"; "Phone Number:" with "(505) 123-4567"; "Fax Number:" with "(505) 765-4321"; and "Company Logo Image:" with the path "D:\Doctrack\logo\Logo1.jpg". A note below the logo field states: "(NOTE: Valid image file types for the report logo are: BMP, GIF, JPG or WMF)". At the bottom of the dialog are three buttons: "Save Variables" (with a blue checkmark icon), "Abandon Changes" (with a red X icon), and "Help" (with a blue question mark icon).

The internal tracking number is created “behind the scenes” every time you add a new classified item to the DocTrak database. The second tab describes, in detail, how the internal tracking number is created. YOU are responsible for creating a “Company Prefix”, that can be any combination of six alphanumeric characters, that will be used to create the tracking number:



Query By Example (aka: Filter)

Often times when you don't want everything stored within a database to be displayed onscreen or printed within a – instead, you want to display only the portion of the information that is important to you (i.e. a subset of data). In the computer world, retrieving / displaying / printing a subset of data is called “Query by Example” or QBE – in layman's terms, QBE could be called “*filtering*”. It is a convenient way of “*hiding*” information – the information is still stored in the database file(s) where it is kept, but it's not displayed

A telephone book is a useful example of QBE – the entire book is considered to be a database of information that is broken into alphabetically divided sections. You use your eyes and fingers to execute a QBE filter by navigating to a desired section (e.g. the first page where names start with the letter “R”) - the non-essential information (i.e. names starting with A-Q) is hidden from view, thus enabling you to quickly scan for the desired name that begins with the letter “R”..

This software application uses an intuitive "Windows Wizard" approach to building/executing QBE filters. A “Windows Wizard” a type of user interface that presents the user (aka: YOU) with a sequence of popup windows to guide you through a series of well-defined steps to complete a task (which is to build a QBE filter). Throughout the wizard process you can freely move backwards and forwards through the popup windows to shape the resulting QBE filter.

Within this software application a QBE filter **CANNOT**, and **WILL NOT**, change or delete the contents of **ANY** data that is stored in a database! A QBE filter is used only to temporarily ‘*hide*’ data from being displayed onscreen or printed on a report's page.

That bears repeating – A QBE FILTER USED IN THIS SOFTWARE APPLICATION WILL NOT DELETE OR CHANGE STORED DATA!

Not only does this software application use one of the most intuitive QBE interfaces available, but the QBE Wizard can

- Build queries that you can save for re-use. For example, if you learn how to build QBE filters you can proactively build QBE filters for all possible data viewing/printing scenarios – less computer-savvy users can immediately use the saved QBE filters!
- You can use the QBE Wizard interface to load an existing QBE filter, tweak it, and save it to a new QBE filter!
- In most cases, QBE filters are reusable between that database file's Browse Window and its associated reports!
- A query can be as simple (e.g. Country=France) or as complex (e.g. Country=France AND Visit Start Date >= '02/14/03' AND Location Visited = 'Canada') as your database filtering needs require – and the QBE Wizard interface will help guide you through the process!

REMEMBER: Experimenting with a QBE filter will NEVER harm your database!

QBE Wizard

The QBE Wizard is comprised of a series of popup windows that always display buttons titled **BACK** and **NEXT** (to guide you forwards and backwards through the wizard process). The QBE process is broken into three steps:

1. What database field will be used to limit how information is displayed onscreen / printed on a report page?
2. What operator will be used to determine how that selected database field is manipulated?
3. What value is that selected database field going to be compared against?

For example, the three steps described above, in English terms, could be described like this:

Show only those Last Names that Start With the letter "R"

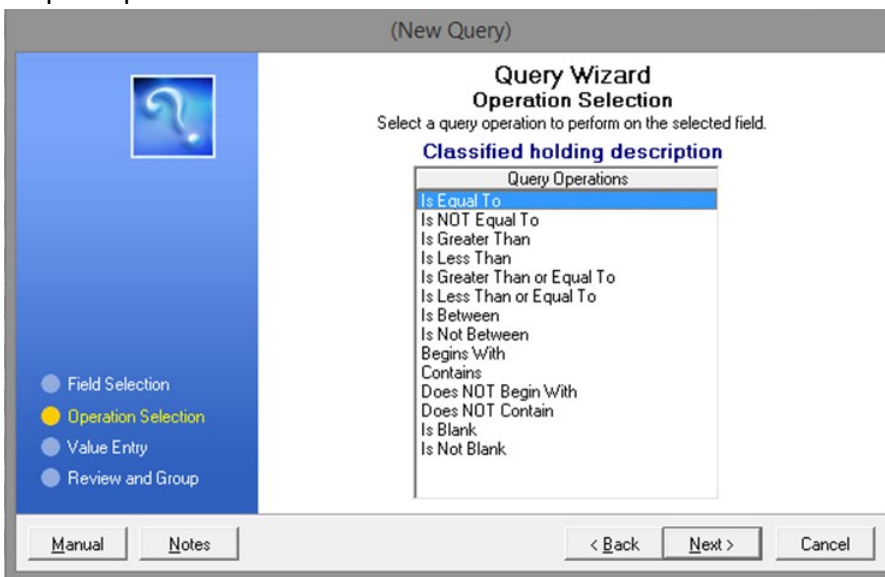
The example shown below shows the QBE Filter wizard "in action" to build a query filter where a person is visiting from CANADA:

Step 1: Field Selection



The 'Fields to Evaluate' for this QBE Filter is titled 'Country the visitor claims to be living'; after it has been selected the **NEXT** button is clicked to continue the QBE Wizard process.

Step 2: Operation Selection



As shown above, the QBE wizard module is asking how the selected field ("Country the visitor claims to be living") will be evaluated. Some of the operation choices are used only for database fields that contain only number values (Is Greater Than, Is Less Than, Is Greater Than Or Equal To, Is Less Than Or Equal To) while others are used database fields that contain text (Begins With, Contains, Does NOT Begin With, Does NOT

Contain). Some Operation options work with either numbers or text (Is Equal To, Is NOT Equal To).

For this example, the option 'Begins With' was selected and the **NEXT** button was then clicked to continue the QBE Wizard process.

Step 3: Value Entry (For Operation)

(New Query)

Query Wizard Value Entry

Enter a value to complete your expression.

Constant Value Another Field Expression

Country the visitor claims to be living Begins With:

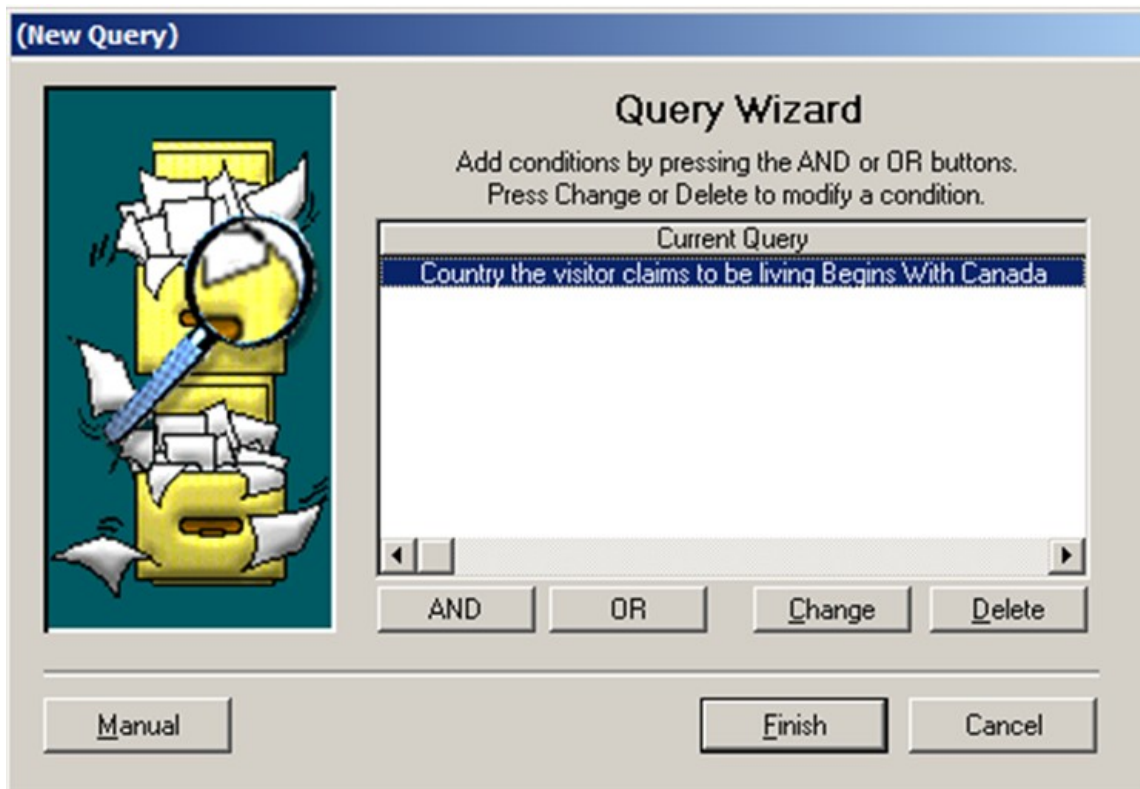
Compare Using Case Sensitive Matching

Manual < Back Next > Cancel

The entry field above stores the value that the chosen database field (Country the visitor claims to be living) will be compared against. The default radio button titled '**Constant Value**' will be used in this example; the other options '**Another Field**' and '**Expression**' allow for more complex queries to be created. The checkbox titled 'Compare Using Case Sensitive Matching' will be left unchecked to enable the text string being searched to be converted to uppercase and the search text string to also be uppercase - otherwise, the case that the information is entered in the database would have to be a perfect uppercase/lowercase match for the text entered in the data entry field.

For this example, the text 'Canada' was entered into the data entry field, and then the **NEXT** button was clicked.

Step 4: Query Overview



The window above serves two purposes:

1. Shows what the current query is
2. Allows you to continue building a more complex query by using the AND/OR Query Conditional Operators

Conditional Operators are used to string together several 'query conditions' into one large query. For example, if the desired query is to pull only those visitors from Canada, and visited AFRL, you would have to use a Conditional Operator to achieve this means. The sample query would resemble:

Country Begins With Canada AND Location Visited Equals AFRL

Conditional Operators can become a little tricky, as they work differently. Looking at the boldfaced query above, there are two components to the query:

1. Country Begins With Canada
2. Location Visited Equals AFRL

Each component of the query will return a value of TRUE or FALSE when evaluated. The Conditional Operators decide how each side of the query is evaluated, and decides if a

database record met the query condition or not. The difference between the two Conditional Operators is:

- AND - Both sides of the query condition must return a value of TRUE for that database record to be 'flagged' by the query
- OR - Either side of the query condition must return a value of TRUE for that database record to be 'flagged' by the query

To elaborate a little further on Conditional Operators, pretend the Visitor database has three database entries:

1. Database Record 1

Visitor Name = Alfred E. Neuman from Canada visiting AFRL

2. Database Record 2

Visitor Name = Bugs Bunny from Canada visiting DOE

3. Database Record 3

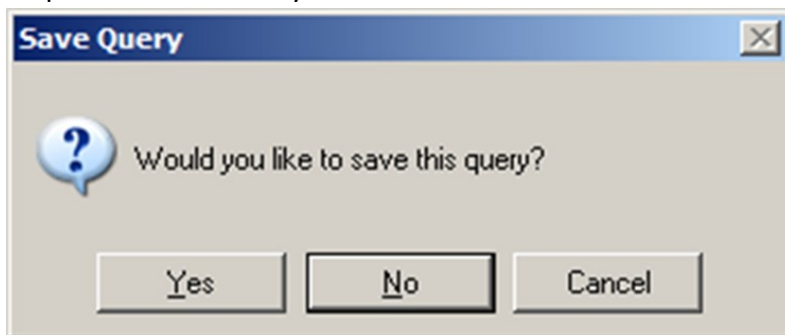
Visitor Name = Spuds McKenzie from Brazil visiting AFRL

The query (Country Begins With Canada AND Location Visited Equals AFRL) would only flag database record number 1, since the second database record shows that person (Bugs Bunny) is visiting DOE; the second part of the query would return a value of FALSE.

The query (Country Begins With Canada OR Location Visited Equals AFRL) would flag all three database records, since each has at least one portion of the query that could return a value of TRUE.

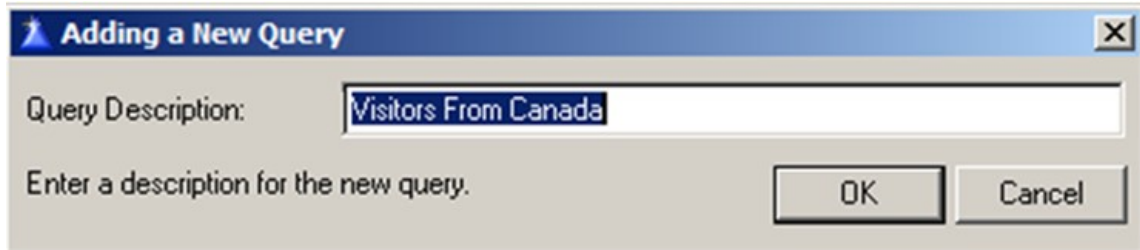
It may take some experimentation on your part to tweak the Query to return the desired end result. For this example, this query is complete, so the FINISH button is clicked.

Step 5: Save The Query?



The QBE wizard is providing the opportunity to save the newly built/edited query to the Query database. If the NO button is clicked, the query is applied to the Browse or Report and then discarded. For this example the **YES** button is clicked.

Step 6: Saving the Query For Re-use



Enter a meaningful QBE filter description in the provided space. Click the **OK** button when completed.

QBE Interface Types

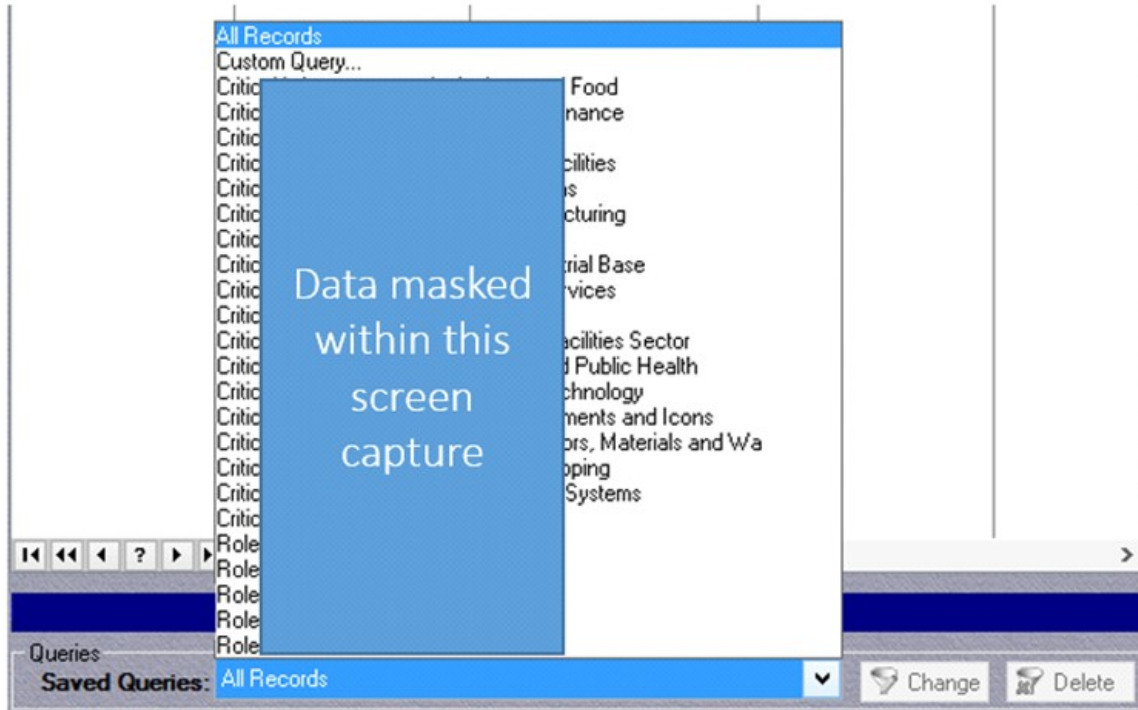
You will encounter the QBE module in two areas of this software application:

1. A Browse Window – the QBE is used to “hide” information from being displayed within the listbox control
2. Before a report is generated to the Print Preview screen – the QBE is displayed onscreen to enable the report’s output to contain either all, or a subset of, the database that the report is generated from

The **Browse Window QBE INTERFACE** uses an intuitive interface to retrieve a saved query (via the droplist control) and the ability to modify an existing query or delete a query from the query database. This interface is displayed directly underneath the listbox:



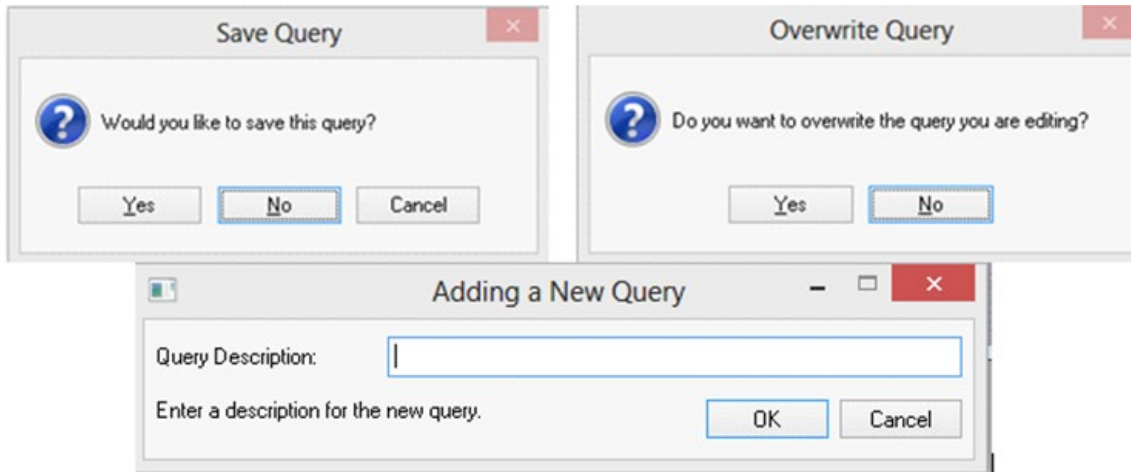
When the droplist ‘down arrow’ is clicked with the mouse a list of all saved queries that have been created for that database is displayed onscreen:



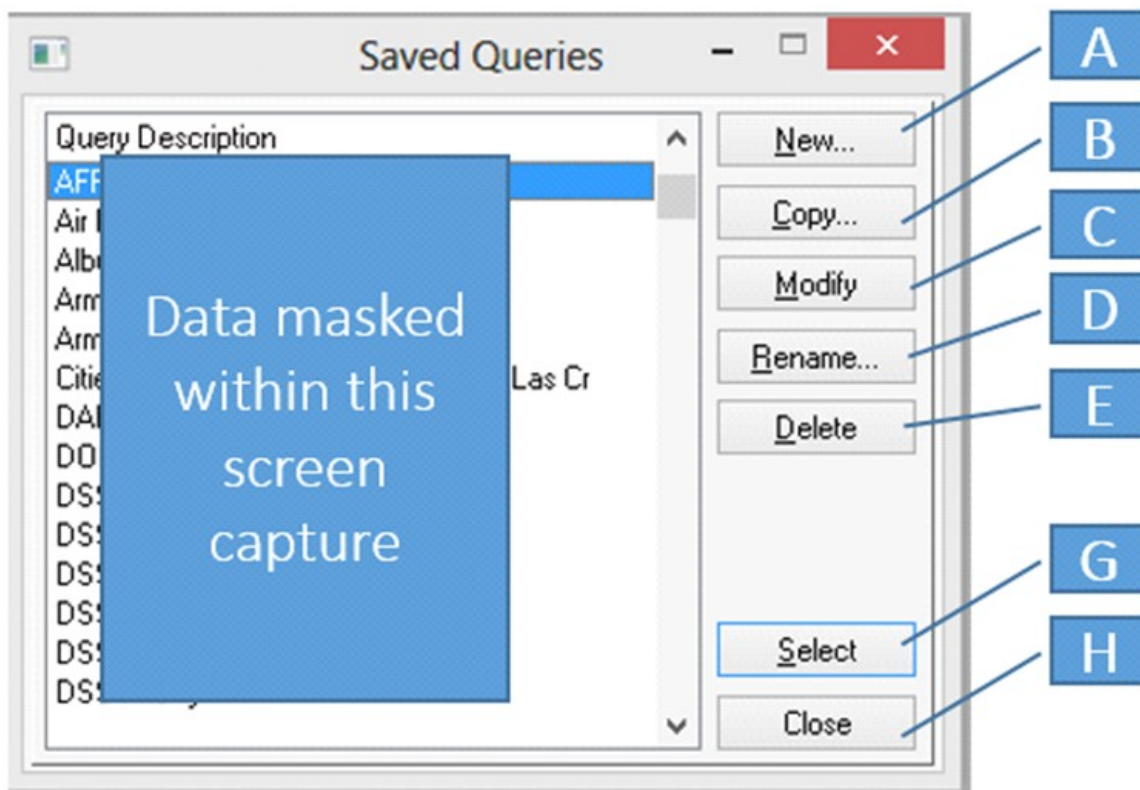
At the top of the query list is the option titled **'All Records'** – if selected from the query list any active query is cancelled and all database records are displayed within the listbox. The second item within the query list is the option titled **'Custom Query...'** if selected, the QBE Wizard will be displayed onscreen to build a new query.

As displayed in the above screen capture, a substantial number of queries have been built for this listbox. If any of the picklist entries (except for the entries titled 'All Records' or 'Custom Query...' are selected that query will be activated and the listbox content will be limited to only those database records that match that query condition.

To modify an existing query you first select / activate an existing query – ideally, that existing query is similar to how you want the new query condition to temporarily 'hide' the listbox data. Once a query has been selected the buttons titled **'Change'** and **'Delete'** become active – click the button titled **'Change'** to then display the Query Wizard screen that will already have that existing query condition populated within the Query Wizard – you can then add to / modify the query to satisfy the filter need. Whenever an existing query is modified within the Query Wizard options to either save the modified query using the original query name or save the modified query to a new query name will be presented onscreen:



The **Report QBE INTERFACE** uses a different interface than the Browse Window QBE Interface – the primary reason being that when a report is selected for generation to the Print Preview screen there is no existing window to select an existing query from a droplist – instead, a new popup dialogue window is displayed onscreen to decide whether a query will be applied to the report (to limit the printed report’s output to only a subset of the data) or include all database records within the report. The dialogue window:



- a) Create a new query using the QBE Wizard
- b) Clone the highlighted query – a popup window will ask for the new query’s name

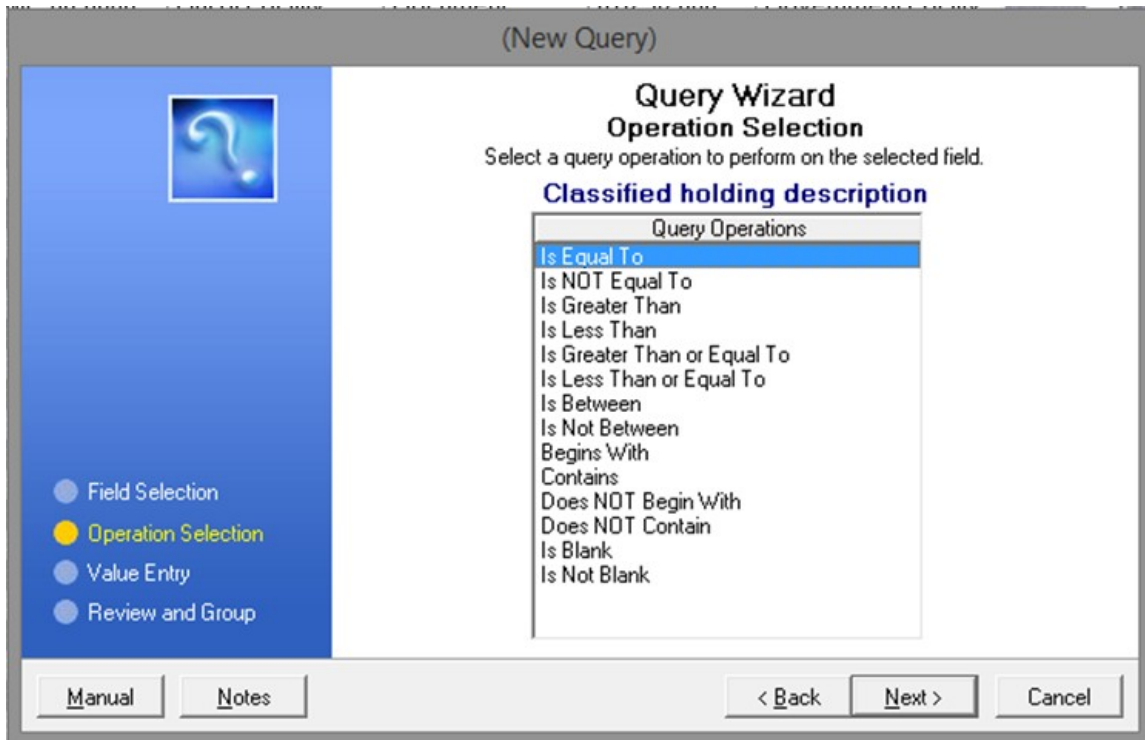
- c) Modify the highlighted query via the QBE Wizard
- d) Rename the highlighted query via a popup window
- e) Delete the highlighted query from the query database
- f) Select (aka: execute) the highlighted query; the report's output will have the filter activated to limit information displayed within the report to the query's specifications
- g) Close this window and then execute the report – all database records will be printed

QBE Expression

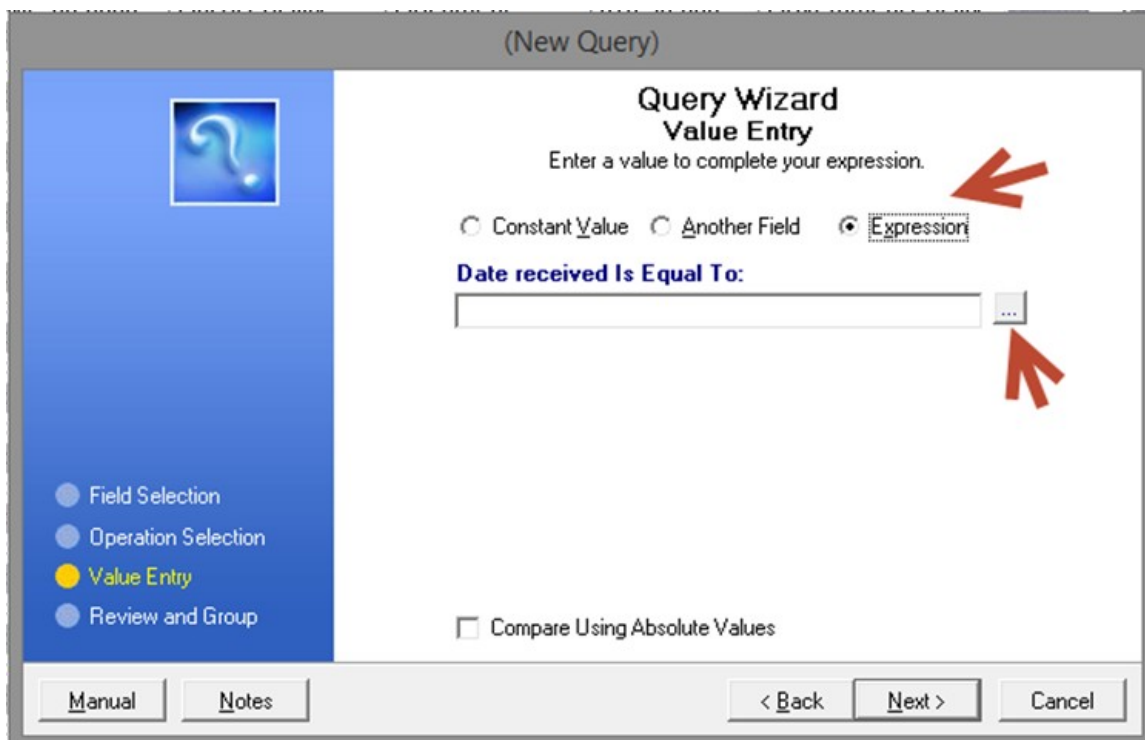
'Expression Mode' enables you to build more complex queries with a 'helping hand' to guide you through the process. To access the Expression Builder the process starts out the same as building a simple query - first you select the database field that you want to build the query against and then click **NEXT**:



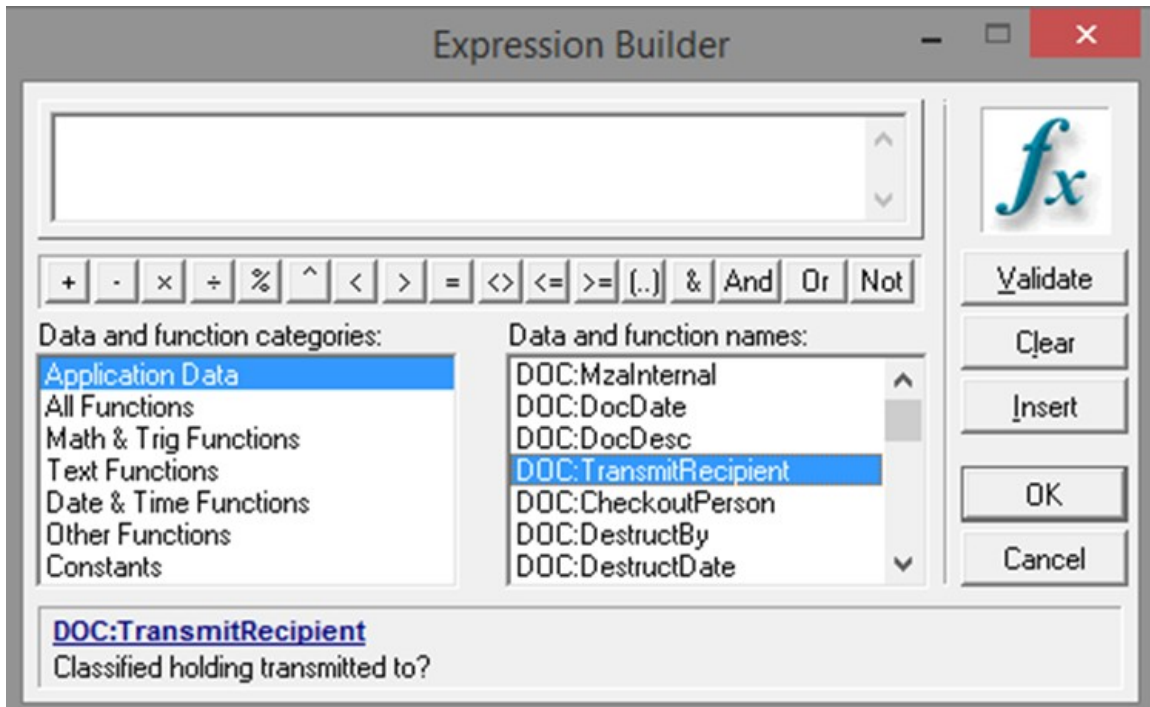
and then the OPERATOR is chosen and the **NEXT** button is clicked:



By default the radio button 'Constant Value' is selected; click the 'Expression' radio button, which will display a clickable box next to the data entry field:



Once the box is clicked the Expression Builder is displayed onscreen:



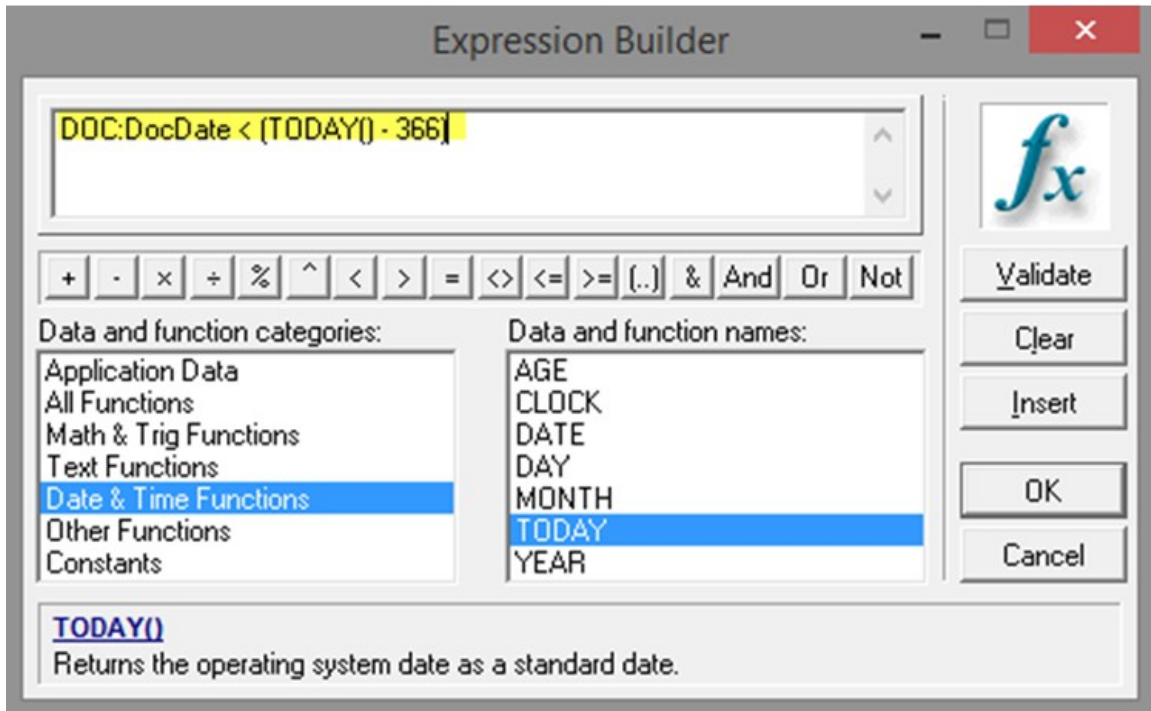
The box displayed at the top of the window is actually a data entry field that you can manually enter the query string; it will also store the query expression as you select items listed under the 'Data and function categories' and 'Data and function names' listboxes. Displayed underneath the data entry field is a row of clickable buttons for each possible OPERATOR. On the far right of the window are clickable buttons that clearly indicate their purpose by how they are labeled - the most important button being the '**Validate**' button - when clicked, the query expression is checked to ensure a legitimate query expression has been created.

When a selection is clicked on the left listbox (e.g. Text Functions), the right listbox will display legitimate choices for that item. By default, the 'Application Data' entry is selected in the left listbox, which displays every database field in the application in the right listbox.

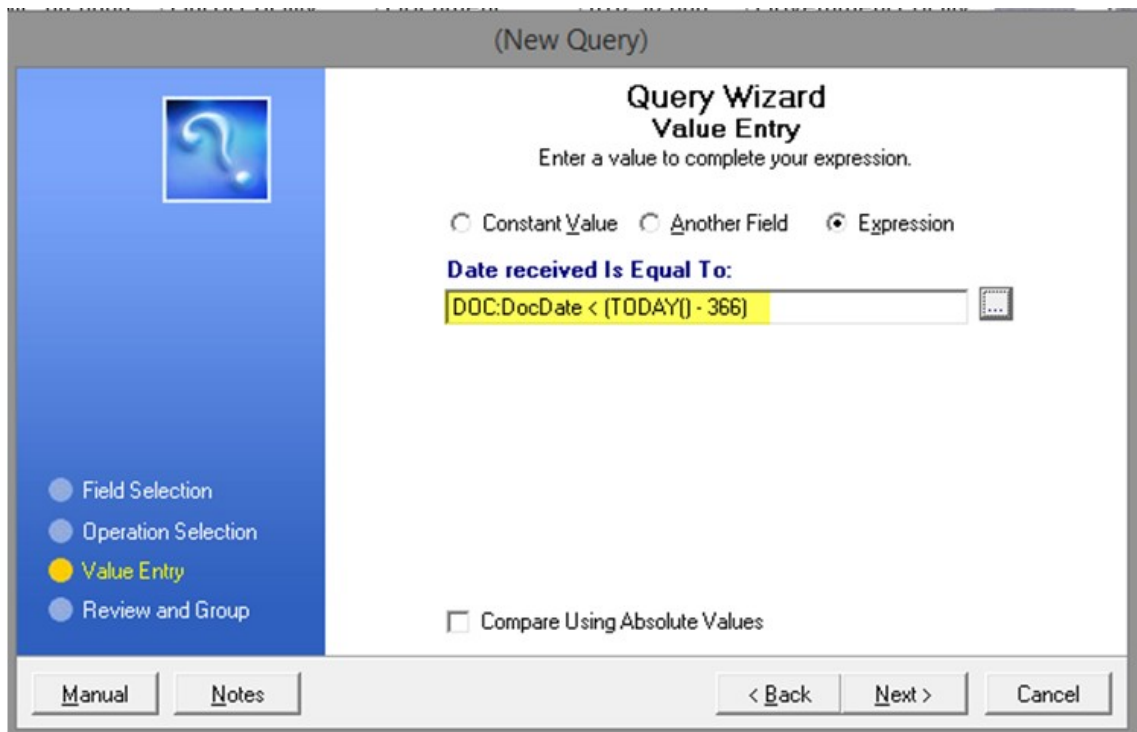
To build the query expression, you use a combination of the 'Application Data' choices with one, or more, of the available functions by clicking the mouse on the desired item(s). As the query expression is being built, periodically click the '**Validate**' button to minimize troubleshooting an incorrect query expression. After the query expression is built, click the '**OK**' button to close the Query Builder window and insert the completed query expression into the query wizard.

Depicted below is a completed query string that was built using typed text and clicking Expression Builder buttons that compares a stored value (DOC:DocDate) against the computer's current date (returned from the Today() function) minus 366 days - this

query would return only those database records where the value stored in the DOC:DocDate field is older than one year from the current date:



After the query expression is built the 'OK' button is clicked to return to the Query Builder; the Query Expression is automatically inserted into the Query Wizard window:



QBE Functions

The Query Wizard has additional functionality/power embedded within it - not only can you compare the content of a database field against a static value (e.g. Doc:State = 'NM'), but you can use "functions" to manipulate the data (or manipulate what the data is being compared against). Here is a comprehensive list of functions that can be used to build a query:

Date & Time Functions

- AGE(birthdate [,base date]); returns a string containing the time elapsed between two dates
Calculate an employee's current age based upon their stored birthday (DOC: Birthdate)
AGE(DOC:Birthdate, TODAY())
- CLOCK(); returns the time of day from the operating system time in standard time.
- DATE(month,day,year); returns a standard date for a given month, day, and year.
- DAY(date); computes the day of the month (1 to 31) for a given standard date.
Return the numeric day of the month for a stored date (DOC:HIREDATE)
DAY(DOC:HIREDATE)
- MONTH(date); returns the month of the year (1 to 12) for a given standard date.
Determine if the stored date (DOC:TransactionDate) occurred in July
MONTH(DOC:TransactionDate) = 7
- TODAY(); returns the operating system date as a standard date.
Determine if a stored field value (DOC:TransmitDate) is older than 30 days old from the current date
TODAY() - DOC:TransmitDate > 30
- YEAR(date); returns a four digit number for the year of a standard date (1801 to 9999).
Determine if a stored field value (DOC:TransactionDate) is older than 2000
YEAR(DOC:TransactionDate) < 2001

Math/Trig Functions

- ABS(expression); returns the absolute value of an expression. The absolute value of a number is always positive (or zero).
- ACOS(expression); returns the inverse cosine.
- ASIN(expression); returns the inverse sine.
- ATAN(expression); returns the inverse tangent.
- COS(radians); returns the cosine of a numeric expression.
- INT(expression); returns the integer portion of a numeric expression. No rounding is performed, and the sign remains unchanged.
- LOG10(expression); returns the base 10 logarithm of a numeric expression.
- LOGE(expression); returns the natural logarithm of a numeric expression.

- ROUND(expression,order); returns the value of an expression rounded to a power of ten.
- SIN(radians); returns the trigonometric sine of an angle measured in radians.
- SQRT(expression); returns the square root of the expression.
- TAN(radians); returns the trigonometric tangent of an angle measured in radians.

Other Functions

- CHOOSE(condition, [true value, false value]); evaluates the expression or condition and returns the appropriate value parameter. If the expression resolves to a positive integer, that integer selects the corresponding value parameter for the CHOOSE procedure to return. If the expression evaluates to an out-of-range integer, then CHOOSE returns the last value parameter
- CHR(code); returns the ANSI character represented by the ASCII character code parameter.
- INLIST(searchstring,liststring,liststring [,liststring...]); returns item in a list.
Determine if a stored value (DOC:ZIPCODE) contains one of several possible values
INLIST(DOC:ZIPCODE, '87105', '87113', '87121') > 0
- INRANGE(expression, low, high); returns TRUE if the value of the expression is within the low/high range.
Determine if a stored value (DOC:PRESSURE) is between a numeric range
CHOOSE(INRANGE(DOC:PRESSURE, 30, 35) = 1, 'Tire Pressure OK', 'Check Tire Pressure')
- INSTRING(substring,string [,step] [,start]); returns the step number on which the substring was found in the string.
Check if the word 'Carpenter' exists within a notes field (DOC:NOTES)
CHOOSE(INSTRING(DOC:NOTES, 'Carpenter') > 0), 'Text Found', 'Text Absent')
- NULL(field); returns a non-zero value (true) if the field is null, and zero (false) if the field contains any known value (including blank or zero).
- RANDOM(low,high); returns a random integer between the low and high values.
- VAL(character); returns the ASCII code of a character.

Text Functions

- ALL(string [,length]); returns a string containing repetitions of the character sequence string.
- CENTER(string [,length]); first removes leading and trailing spaces from a string, then pads it with leading and trailing spaces to center it within the length, and returns a centered string
- CLIP(string); removes trailing spaces from a string.
Combine last and first names that are stored (DOC:FNAME and DOC:LNAME), separated with a comma
clip(DOC:LNAME) & ', ' & clip(DOC:FNAME)

- DEFORMAT(string [,picture]); removes formatting characters from a numeric string, returning only the numbers contained in the string.
- FORMAT(value,picture); returns a numeric string formatted according to the picture parameter.
Format a stored date value (DOC:HireDate) from 01/01/2010 to month, day year
FORMAT(DOC:HireDate, @D4)
- ISALPHA(string); returns TRUE if the string passed to it is alphabetic (an upper or lower case letter) and false otherwise.
- ISLOWER(string); returns TRUE if the string passed to it is a lower case letter and false otherwise.
- ISUPPER(string); returns TRUE if the string passed to it is an upper case letter and false otherwise.
- LEFT(string [,length]); returns a left justified string. Leading spaces are removed from the string. Spaces are padded on the right to return a string of the "length" specified. To remove trailing spaces use CLIP(LEFT())
Remove leading and trailing spaces from a stored field value (DOC:GENDER)
CLIP(LEFT(DOC:GENDER))
- LEN(string); returns the length of a string.
Take action if a stored field value (DOC:PHONE) is empty but you want something to print anyway on the report
CHOOSE(LEN(CLIP(DOC:PHONE)) = 0, 'No Phone #', DOC:PHONE)
LOWER(string); returns a string with all letters converted to lower case.
Convert a stored field value (DOC:SALUTATION) to lowercase
LOWER(DOC:SALUTATION)
- MATCH(first, second [, mode]); returns true as to whether the first and second parameters match.
- NUMERIC(string); returns the value 1 (true) if the string only contains a valid numeric value. It returns zero (false) if the string contains any non-numeric characters.
- RIGHT(string, length); extract text from a string from right to left.
Determine if a stored value (DOC:ZIPCODE) ends with '121'
RIGHT(DOC:ZIPCODE,3) = '121'
- SUB(string,position,length); returns a portion of a string.
Determine if a stored value (DOC:ZIPCODE) starts with '871'
SUB(DOC:ZIPCODE, 1, 3) = '871'
- UPPER(string); Returns all upper case string.
Oftentimes you can't trust that data stored in a database is entered in the same case (upper, lower, mixed) - if you convert the text being searched to all upper case, and the search string is also uppercase, you will be guaranteed a match if one exists. For example, DOC:CITY contains variations of the text string 'Albuquerque' - sometimes lowercase, sometimes mixed case. To guarantee the query will work regardless of how the city was typed you need to enter the query string like this:
- UPPER(DOC:CITY) = 'ALBUQUERQUE'

Date Picture Parameters

<u>Picture</u>	<u>Format</u>	<u>Result</u>
@D1	mm/dd/yy	10/31/59
@D1>40	mm/dd/yy	10/31/59
@D01	mm/dd/yy	01/01/95
@D2	mm/dd/yyyy	10/31/1959
@D3	mmm dd,yyyy	OCT 31,1959
@D4	mmmmmmmm dd, yyyy	October 31, 1959
@D5	dd/mm/yy	31/10/59
@D6	dd/mm/yyyy	31/10/1959
@D7	dd mmm yy	31 OCT 59
@D8	dd mmm yyyy	31 OCT 1959
@D9	yy/mm/dd	59/10/31
@D10	yyyy/mm/dd	1959/10/31
@D11	yyymmdd	591031
@D12	yyyymmdd	19591031
@D13	mm/yy	10/59
@D14	mm/yyyy	10/1959
@D15	yy/mm	59/10
@D16	yyyy/mm	1959/10
@D17		Windows Control Panel setting for Short Date
@D18		Windows Control Panel setting for Long Date
Alternate separators		
@D1.	mm.dd.yy	Period separator
@D2-	mm-dd-yyyy	Dash separator
@D5_	dd mm yy	Underscore produces space separator
@D6`	dd,mm,yyyy	Grave accent produces comma separator

Pattern Picture Parameters

@P[<][#][X]P[B}

<u>Picture</u>	<u>Format</u>	<u>Result</u>
@T1	hh:mm	17:30
@T2	hhmm	1730
@T3	hh:mmXM	5:30PM
@T03	hh:mmXM	05:30PM
@T4	hh:mm:ss	17:30:00
@T5	hhmmss	173000
@T6	hh:mm:ssXM	5:30:00PM
@T7		Windows Control Panel setting for Short Time
@T8		Windows Control Panel setting for Long Time
Alternate separators		
@T1.	hh.mm	Period separator
@T1-	hh-mm	Dash separator
@T3_	hh mmXM	Underscore produces space separator
@T4`	hh,mm,ss	Grave accent produces comma separator

Examples:

<u>Picture</u>	<u>Value</u>	<u>Result</u>
@P###-##-####P	215846377	215-84-6377
@P<#/##/##P	103159	10/31/59
@P(###)###-####P	3057854555	(305)785-4555
@P###/##-####P	7854555	000/785-4555
@p<#:#Pmp	530	5:30PM
@P<#' <#"P	506	5' 6"
@P<#lb. <#oz.P	902	9lb. 2oz.
@P4##A-#P	112	411A-2
@PA##.C#P	312.45	A31.C2

Time Picture Parameters

<u>Picture</u>	<u>Format</u>	<u>Result</u>
@T1	hh:mm	17:30
@T2	hhmm	1730
@T3	hh:mmXM	5:30PM
@T03	hh:mmXM	05:30PM
@T4	hh:mm:ss	17:30:00
@T5	hhmmss	173000
@T6	hh:mm:ssXM	5:30:00PM
@T7		Windows Control Panel setting for Short Time
@T8		Windows Control Panel setting for Long Time

Alternate separators

@T1.	hh.mm	Period separator
@T1-	hh-mm	Dash separator
@T3_	hh mmXM	Underscore produces space separator
@T4'	hh,mm,ss	Grave accent produces comma separator

QBE Default Queries for DocTrak

Listed below are the sample queries that are included with DocTrak:

<u>Description</u>	<u>Query Condition</u>	
Destroyed Holdings	DOC:DestructDate > 0	
Holdings Currently In Inventory	DOC:CurrentLocation = 'In The Facility' AND DOC:DateRecvd = 0	
Transmitted Holdings	DOC:TransmitDate > 0	
Transmitted > 30 Days Ago - No Receipt (LATE)	(DOC:TransmitDate <> 0 AND today() - DOC:TransmitDate > 30) AND (DOC:DateRecvd = 0)	
Holdings Recv'd Past 2 Years Only	(today() - DOC:RecvdDate) < 731	
Transmitted Holdings - Reply Recv'd	DOC:TransmitDate > 0 AND DOC:DateRecvd > 0	

Technical Information

DocTrak does not store data in any other locations on your computer (e.g. C:\Program Files) or within the Windows registry. A breakdown of the DocTrak files:

Configuration Files

- DocTrack.Ini - This is used to store application variables (e.g. the logo to use in report headers).

Databases

- DocTrack.Tps - Database file used to store the classified holding information.
- Loo_Emp.Tps - Database file used to store employee names.
- Recipien.Tps - Database file used to store recipient name and address information.
- Queries.Tps - Database file that stores user-created queries.

Data Integrity Files

- DocTrack.Svb - Used to ensure that the application data files have the correct file structure.
- DocTrack.Svi - Used to ensure that the application data files have the correct file structure.

Executable File

- DocTrack.Exe - The application runtime file.

Help File

- DocTrack.Chm - This is the application's help file.

Runtime file

- ClaAsc.Dll - Ascii runtime engine
- ClaAscx.DLL - Ascii runtime engine
- ClaDos.Dll - MsDos interface
- ClaOle.Dll - OLE runtime engine
- ClaRun.Dll - Runtime engine
- ClaTps.Dll - Topspeed database engine
- Cpc100p32.Dll - Used for the DCR report
- Ctsqw10c100.Dll - Used by the Query Wizard
- CwHHla.Dll - HTML Help interface
- vuLimiter - low level functions
- WpdfControl03.Dll - Used within the Print Preview screen to generate Adobe Acrobat compatible *.PDF files from a report.

- WpdfControlWrapper - Used within the Print Preview screen to generate Adobe Acrobat compatible *.PDF files from a report.

DocTrak also does not place much burden on your computer's Central Processing Unit (CPU; aka: "brain"), computer until you nabu drive or memory. Here is a screen capture of DocTrak running on a Windows 10:

Processes		0%	40%	1%	0%
Name	Status	CPU	Memory	Disk	Network
Apps (7)					
> 1by1 Directory Player (32 bit)		0%	8.7 MB	0.1 MB/s	0 Mbps
> Atlantis Word Processor (32 bit)		0%	98.6 MB	1.6 MB/s	0 Mbps
> doctrack.exe (32 bit)		0%	4.0 MB	0 MB/s	0 Mbps

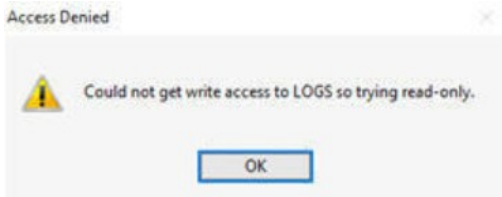
Data Backup

Every company should draft/implement/execute a plan to archive their electronic data to external media, another company-owned computer system and/or the "Cloud" to protect their data from irretrievable loss due to power spikes, power outage and/or theft of the host computer system(s). DocTrak stores its data within *.TPS files – at a minimum, your data backup routine should archive the DocTrak *.TPS files on a recurring basis. Should the DocTrak software need to be reinstalled onto another company-owned computer system, the recovery process would require the reinstallation of the DocTrak software (likely downloaded from the Software by Daughtry web site); enter your unique registration code(s) to fully activate the DocTrak software application, and then recover the *.TPS files from your data archive into the DocTrak installation folder.

Troubleshooting

Could not get write access to <> so trying read-only" error message

Example popup error message:

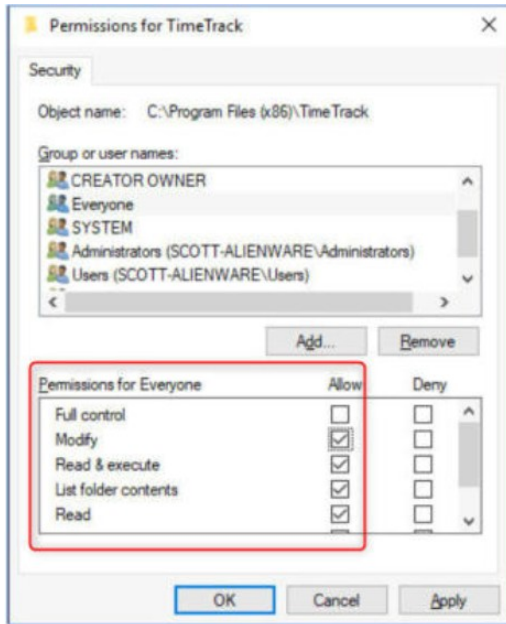


Reason: Database programs write information back to 'database files' – when the application starts it attempts to open the files in READ/WRITE mode. The folder that the database file(s) are stored inside of aren't configured to allow the Windows user account that received this error to change data inside of this folder (and the popup error message is displayed).

Tech-Speak: Windows folder permissions default to the MOST RESTRICTIVE to protect against malware. There are different 'levels' of permissions for every folder; listed below are the different levels listed in least to most restrictive:

- Full Control
- Modify
- Read & Execute
- List Folder Contents
- Read-Write

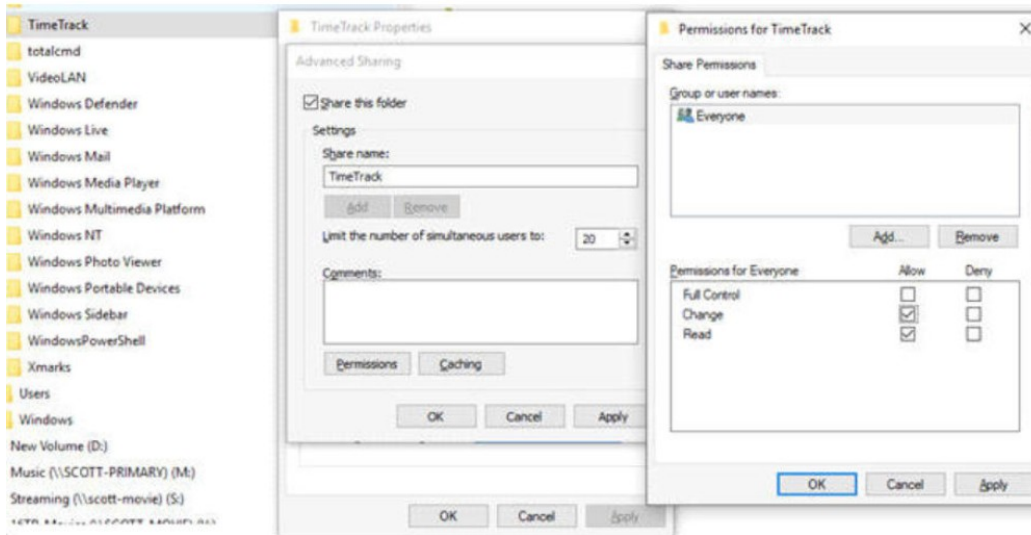
Database applications require WRITE / READ / LIST FOLDER CONTENTS / READ & EXECUTE to save data back to a database file. The "MODIFY" permission has all of these capabilities – this is the folder permission you should use for this database application. Fixing the Problem: Using Windows Explorer (e.g. double-left click the desktop icon named My Computer; alternatively, press the Windows START button, type in EXPLORER and press the OK button), navigate to the folder that the application is installed into (e.g. C:\Program Files (x86)\TimeTrak). Right click the mouse on the folder name (e.g. TimeTrak) to display a popup menu; select PROPERTIES from the list. A popup window is displayed onscreen; click the tab named SECURITY. At the top of that window portion is a list of Windows user groups/accounts; at the bottom is the list of security permissions assigned to that group/account (which changes when a different group/account name is selected). Click the button named EDIT; a sub-window is displayed to add/remove permissions from a group/account. Click ADD; a sub-window is displayed; within the entry field type EVERYONE; click the CHECK NAMES button; click OK to return to the previous sub-window. The 'Everyone' user account is now highlighted (if it's not highlighted, left click it once to select that entry). In the bottom half of the window click the checkbox in the ALLOW column for 'Modify' – this will assign MODIFY permissions to the Everyone user group; the screen will resemble this:



How to share a database app throughout your home/office network

Scenario: **Our** database applications are multi-user capable, meaning your entire office can use this software at the same time. While the application can be installed onto a file server, a more common scenario is one office computer has the software installed; the folder containing the software is SHARED and other machines in the office have a drive mapping created to that SHARED folder and a desktop shortcut placed on the other machines to start the program at the remote desk.

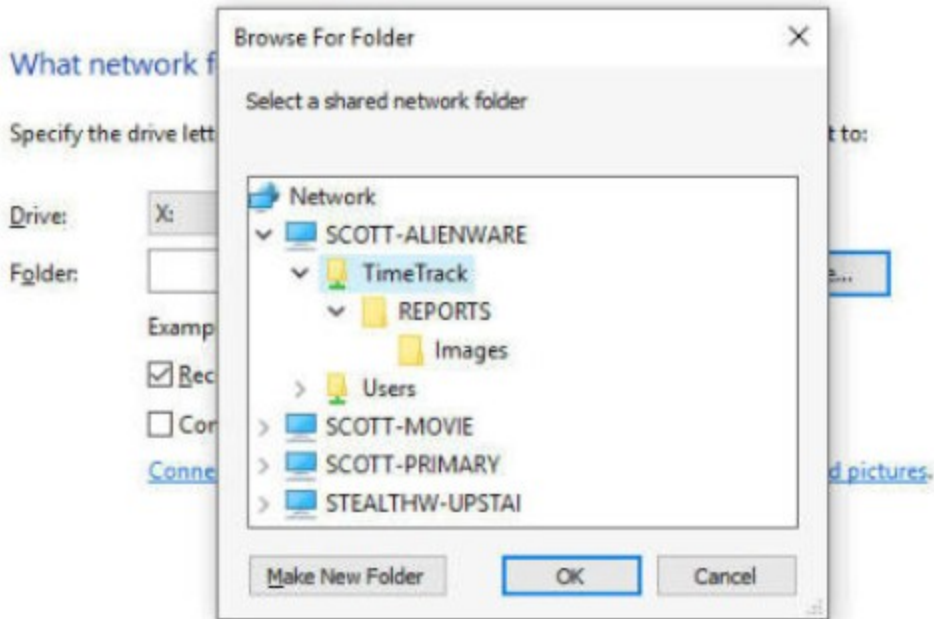
Primary Machine: Log onto the office computer that has the database application installed onto its internal hard drive. Start Windows Explorer and navigate to the folder that contains the database application). Right click the mouse on the folder name (e.g. TimeTrak) to display a popup menu; select PROPERTIES from the list. A popup window is displayed onscreen; click the tab named SHARING. Click the button named ADVANCED SHARING; a popup window is displayed. Click the 'Share this folder' checkbox so a checkmark is displayed inside it; the Share Name can be changed if desired (it defaults to the folder name). Click the PERMISSIONS button; select the Group/User account name 'Everyone' and then ensure checkmarks are displayed inside of the CHANGE and READ checkboxes in the 'Allow' column (as shown below, far right popup window):



Click the OK button to close the 'Permissions' sub-folder. Click OK to close the 'Advanced Sharing' sub-window. Click the Close button to close the Properties window. This folder is now being shared by that computer on your office's internal computer network. The next step is visiting each workstation whose occupant needs to use this shared software application to (a) create a drive mapping to the share you just created and (b) create a desktop shortcut for the application. DONE

How to create a drive mapping to an app on your home/office network

On a computer different than the one the database application was installed onto, have the employee log into their machine; start Windows Explorer. For Windows 10 machines click the HOME button; click the EASY ACCESS button which will display a drop list menu – select MAP AS DRIVE:



A popup window is displayed to assign a Drive Letter to a shared folder located elsewhere on your office network. The drive letter can be any unassigned drive letter; use the default or select one from the droplist. Click the BROWSE button to select the workstation name that the database application is installed on (note: for this example, the workstation name is SCOTT-ALIENWARE); left click that workstation name to expand the list of shared folders. Left click once on the share name (for this example, the shared folder name is 'TimeTrack') and click OK:

When the OK button is clicked the network path (that you just selected via the popup menus) is automatically entered into the folder name entry field:

What network folder would you like to map?

Specify the drive letter for the connection and the folder that you want to connect to:

Drive:

Folder:

Example: \\server\share

Reconnect at sign-in

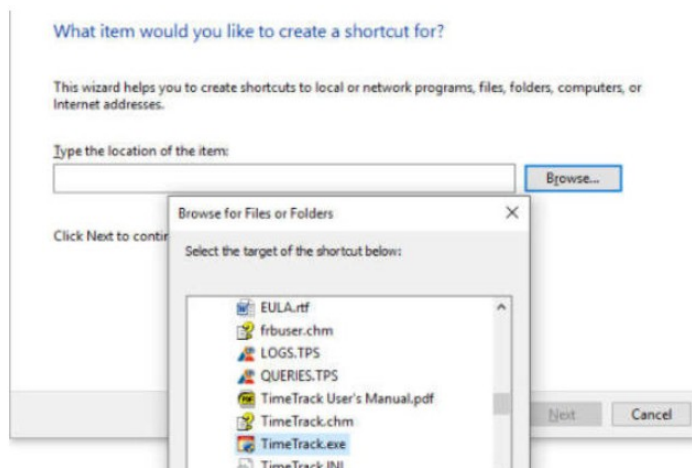
Connect using different credentials

Click FINISH. Drive letter X on this workstation is now mapped to the TimeTrak folder located on the Alienware computer in this office. Repeat this process for the other employees/computers in your office. DONE

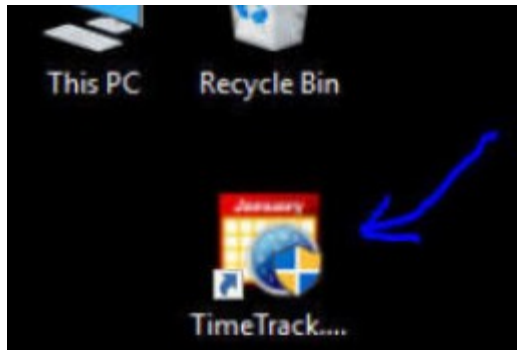
How to create a desktop shortcut to start a database application

PROLOGUE: This instruction assumes that (a) the employee has logged onto their computer and (b) has already created a drive mapping to the database application located on a computer located elsewhere in the office.

1. Return to the Windows desktop by holding down the START menu button and then pressing the letter D
2. Move the mouse cursor anywhere on the desktop that is unoccupied by an icon
3. Right click the mouse
4. From the popup menu select NEW, then SHORTCUT
5. Click BROWSE
6. Left click the entry titled 'This PC'
7. Scroll down until you locate the drive letter that was mapped to the database application located elsewhere on the network; if you've been following this web site's FAQ examples drive letter X is left clicked on once
8. A list of files located in that remote folder are now displayed; scroll down until you see a filename with a .EXE file extension:

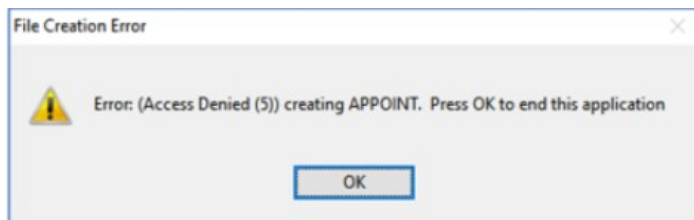


9. Click the OK button after selecting the correct .EXE file (for this example the TimeTrack.exe file is correct). The path to the executable file is inserted into the location entry field. Click NEXT
10. You can either change the Shortcut's Name or leave it to the filename (default). Click FINISH.
11. The new desktop shortcut icon is now added:



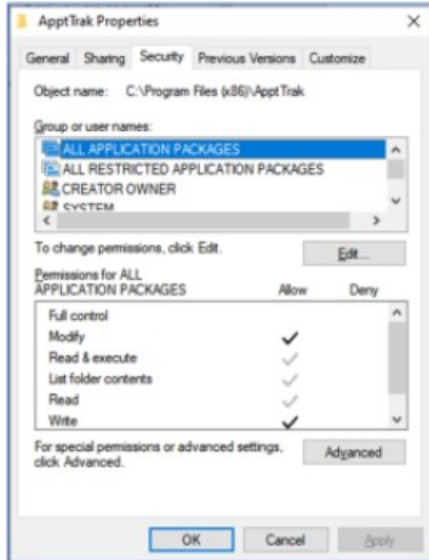
File creation error message appears whenever our application starts

Problem: After starting a Software by Daughtry software application, Windows displays a popup error box:

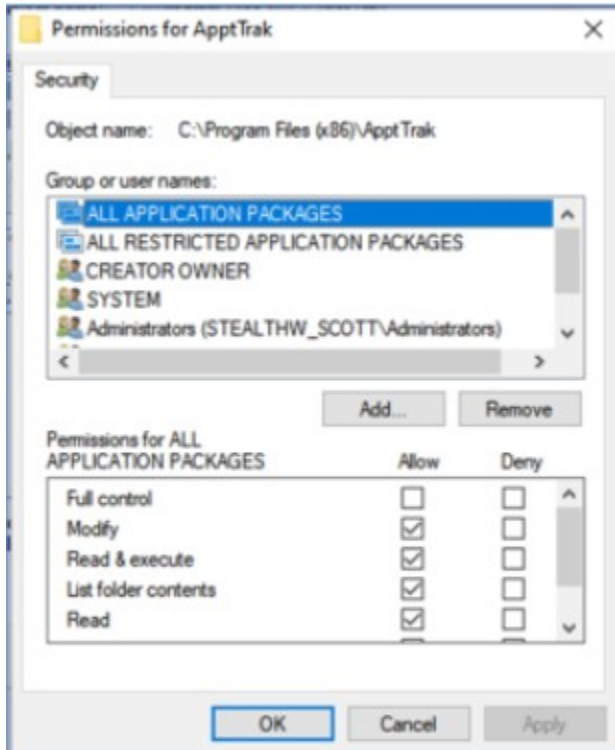


Reason: The software application is trying to create a new file or modify the contents of an existing file and can't because the current Windows user account lacks sufficient Security Permissions inside of that folder to complete the task
Solution: Add the default Windows group "Everyone" to that network folder and assign it MODIFY Security Permissions
Steps: Execute the following steps to resolve this Windows security permissions problem:

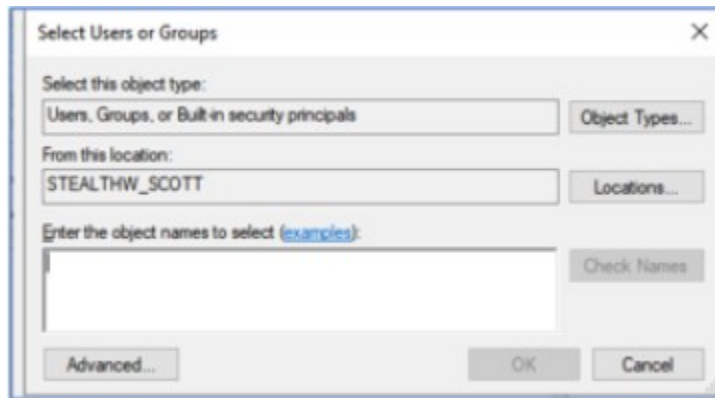
1. Start Windows Explorer (click the START button, type in File Explorer, select that displayed option)
2. Navigate to your C:\Program Files (x86) folder
3. Right click the folder that contains the Software by Daughtry application (e.g. DocTrak); click the Security tab:



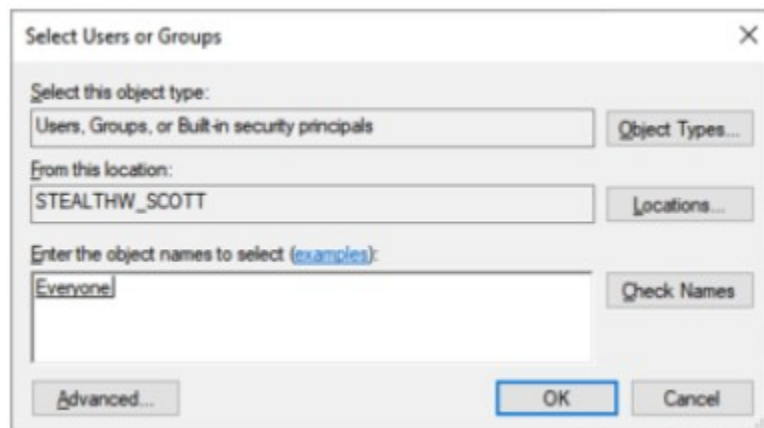
4. Click the EDIT button:



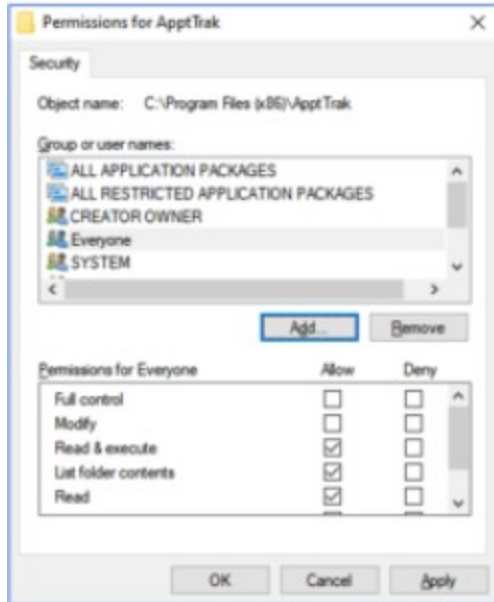
5. Click the ADD button:



6. Within the entry field (the cursor is already placed inside that box) type in the text **everyone**
7. Click the CHECK NAMES button that is now active:

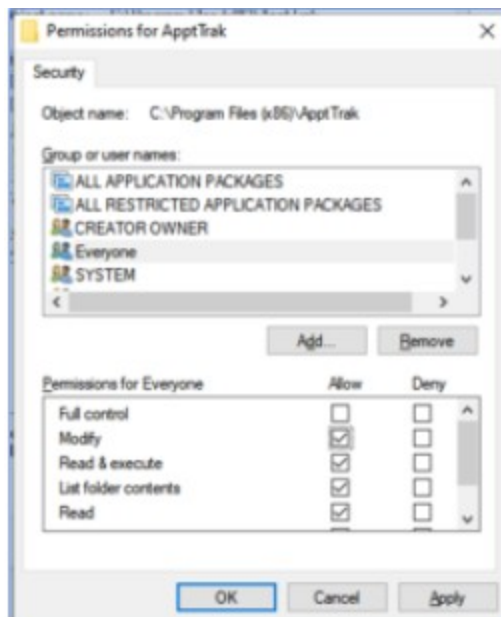


8. When Windows locates the **Everyone** user account that text (that you typed into the entry field) is underlined
9. Click the OK button to close the 'Select Users or Groups' window; the user group **Everyone** is now listed:



Notice the checkbox for 'Modify' for 'Everyone' is currently unchecked - this means that the Modify security permission is currently being denied within this folder for Windows user accounts that are a member of the Everyone user group.

- Left click the Everyone entry to select that Windows user group, then left-click the empty checkbox under Allow for the Modify line; your screen now has checkmarks under the ALLOW column for Modify, Read & Execute, List Folder Contents and Read:



- Click OK to save the changes; click OK in the next window to close the Properties window
- Done

Now, any Windows user account for this computer should be able to create/modify data files within this hard drive folder with no more error messages (as all Windows user accounts are automatically a member of the Everyone user group)

Support and Registration

1. Send us an email (scott@sdaughtry.com) that fully describes the problem(s) you're experiencing and we will get back to you as soon as possible. It is prudent for you to fully back up this application's folder (in full) as a precautionary pre-troubleshooting step.
2. This application is distributed as a TRIAL – upon our receipt of payment, you will receive (via email) a special file that unlocks the application from TRIAL mode to FULL mode – no more restrictions. The software is branded to you/your company. All information entered during the TRIAL period is fully accessible once unlocked. This application's dedicated web page located on our company web site (<http://www.sdaughtry.com>) has the payment instructions should you decide to keep using this application past its TRIAL limitations.