



Basic Instruction Manual

Version 1.0

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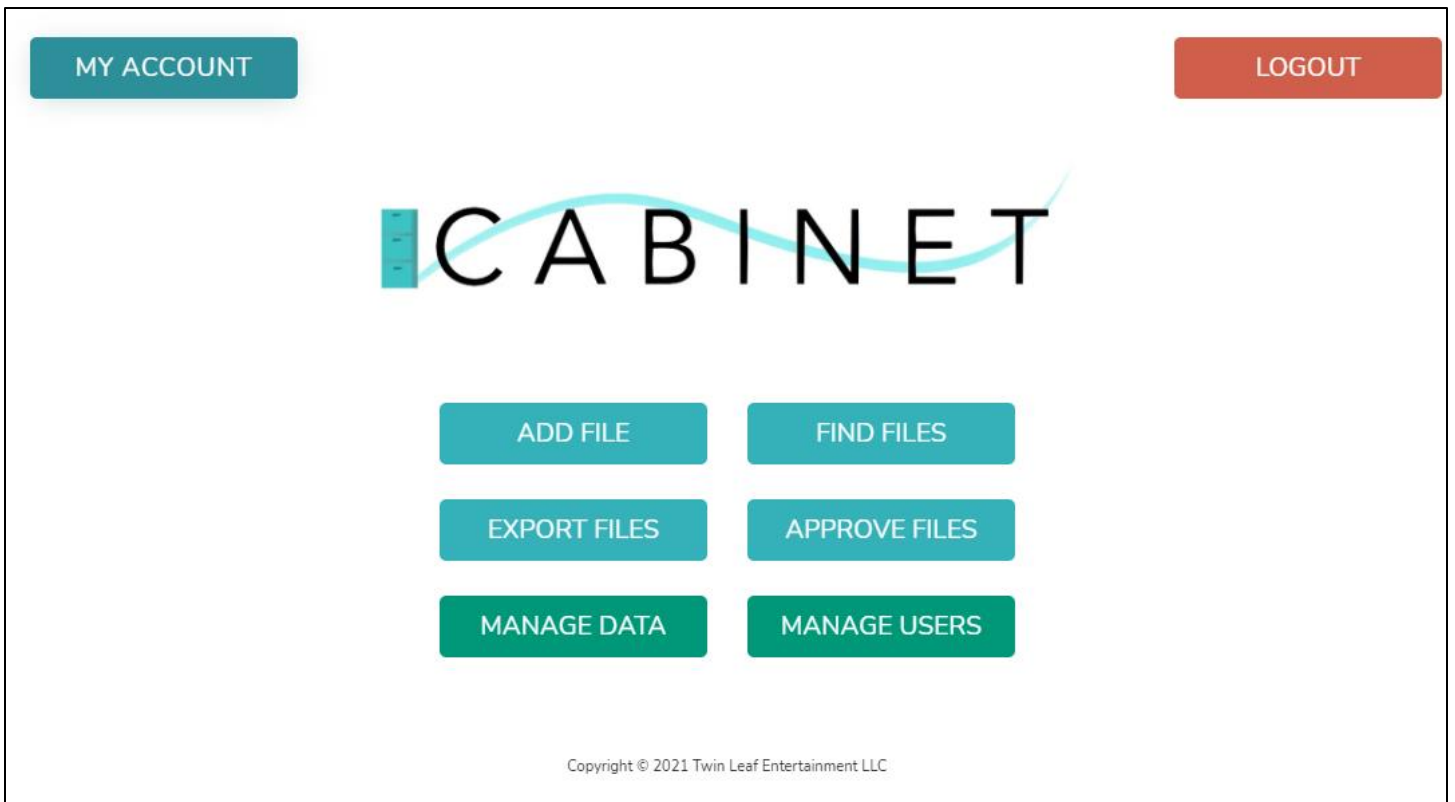
Basic Information

- ❖ The Cabinet File Locator Database provides functionality for companies to effectively maintain records of their physical files, including their specific locations and soft copy locations.
- ❖ You will receive the software in the form of an executable .exe or .app file.
- ❖ The program stores data on a secure SQL server online, NOT locally on a single computer system.
- ❖ Each user must have **a copy** of the software (*exe or app* file) on their computer system.
- ❖ Multiple users **can** be logged in at the same time (concurrently).
- ❖ **CONTACT FOR SUPPORT:** info@twinleafentertainment.com

App Requirements

- ❖ **Platforms:** Cabinet can run on Windows and macOS platforms.
- ❖ **Windows architecture:** The app requires x32 or x64 bit machines. Windows 7 or higher is recommended for using this product, but not required. Windows XP is supported currently but will be outdated in future builds.
- ❖ **RAM:** The minimum RAM for product use is 2 GB, but 4 GB or more is recommended.
- ❖ **Internet Connection:** A stable internet connection is required for the use of this product. A minimum speed of 1 MB per second is required for smooth functioning. The recommended speed is at least 10 MB per second.

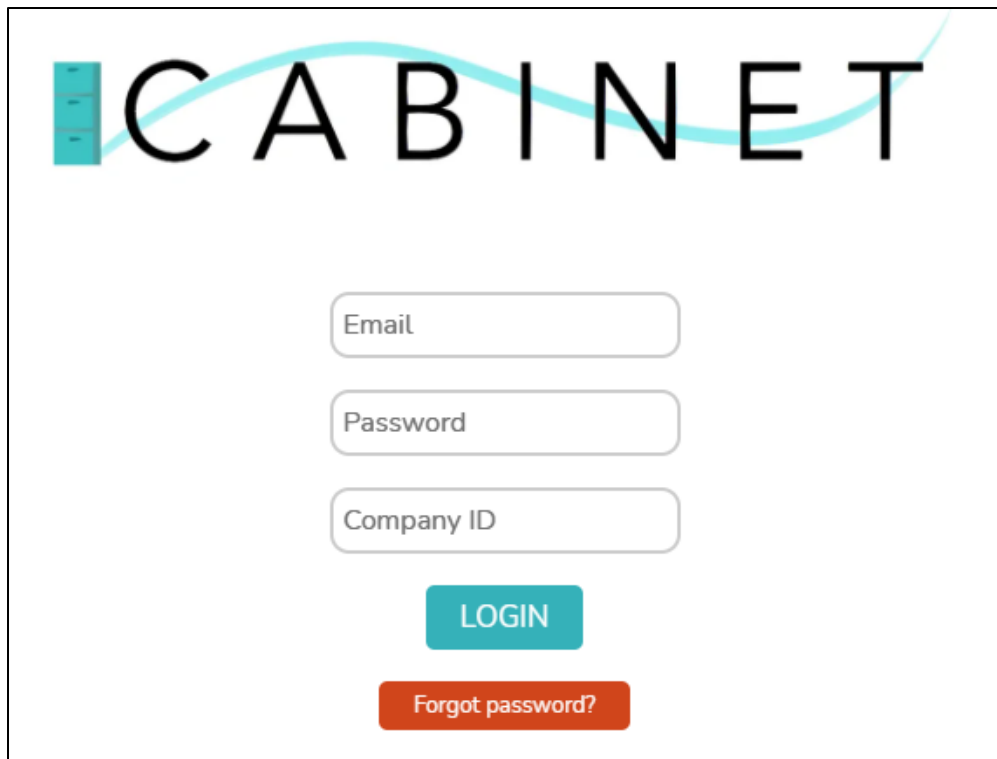
Main Menu



The main menu provides access to all of the product’s functionality from a single page, which are described in detail in the following sections:

1. **My Account** – Edit and update account information.
2. **Add File** – Used to add new files to the system.
3. **Export Files** – Used to export Audit data and file data to excel spreadsheets.
4. **Manage Data** – Used to manage new physical locations, company subsidiaries, and importing file data from excel spreadsheets.
5. **Find Files** – Used to find and edit existing files in the system.
6. **Approve Files** – Used to approve files created by users who are not administrators.
7. **Manage Users** – Used by administrators to create new users and edit permissions for existing users

Login



The image shows a login interface for 'I CABINET'. At the top, the logo consists of a teal square with a white 'I' followed by the word 'CABINET' in black, with a teal wave graphic underneath. Below the logo are three rounded rectangular input fields: 'Email', 'Password', and 'Company ID'. Underneath the 'Password' field is a teal button with the text 'LOGIN' in white. At the bottom of the form area is a red button with the text 'Forgot password?' in white.

- ❖ **Email:** Use your e-mail address that was assigned by an administrator (you will receive a confirmation e-mail). If you are the first user to ever use the program for your company, then our organization will provide a default password for login which you can change once logged in.
- ❖ **Password:** You are given a temporary password via e-mail when your account is first created. You can change this password once logged in via the 'My account' page.
- ❖ **Company ID:** Your company ID is uniquely assigned by our organization, and you cannot change this number yourself, even if you are an administrator. Please contact us if you do not know your ID.

My Account

| | |
|-----------|---|
| Full Name | <input type="text" value="John Doe"/> |
| Email | <input type="text" value="john.doe@example.com"/> |
| Password | <input type="text" value="Required to update"/> |

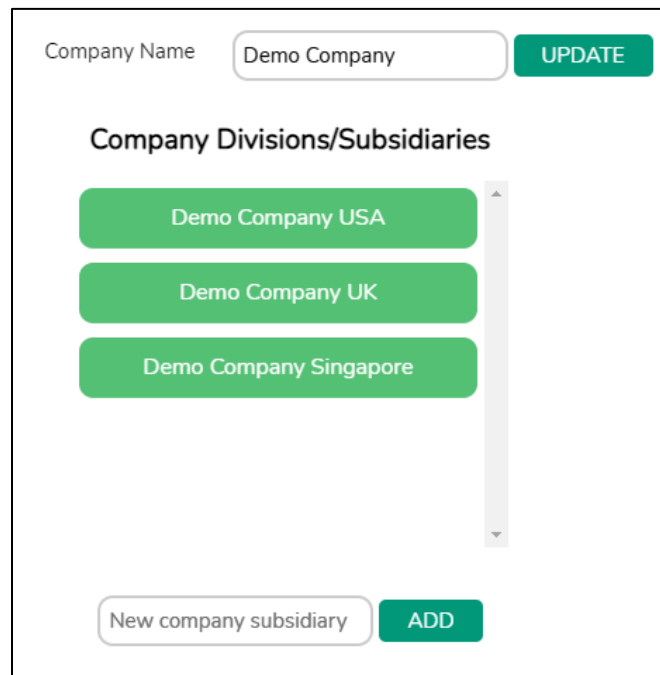
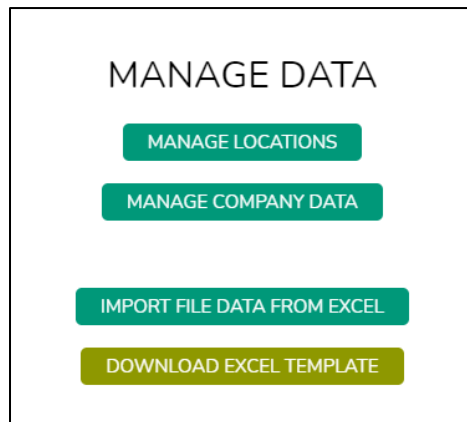
- ❖ Using this screen, you may update your login e-mail address and password, as well as Full Name.
- ❖ You are required to re-enter your current password when updating any information in the system.

| | |
|---------------------|---|
| File Security Level | <input checked="" type="checkbox"/> Classified access (Level 3) |
| | <input checked="" type="checkbox"/> Restricted access (Level 2) |
| | <input checked="" type="checkbox"/> General access (Level 1) |

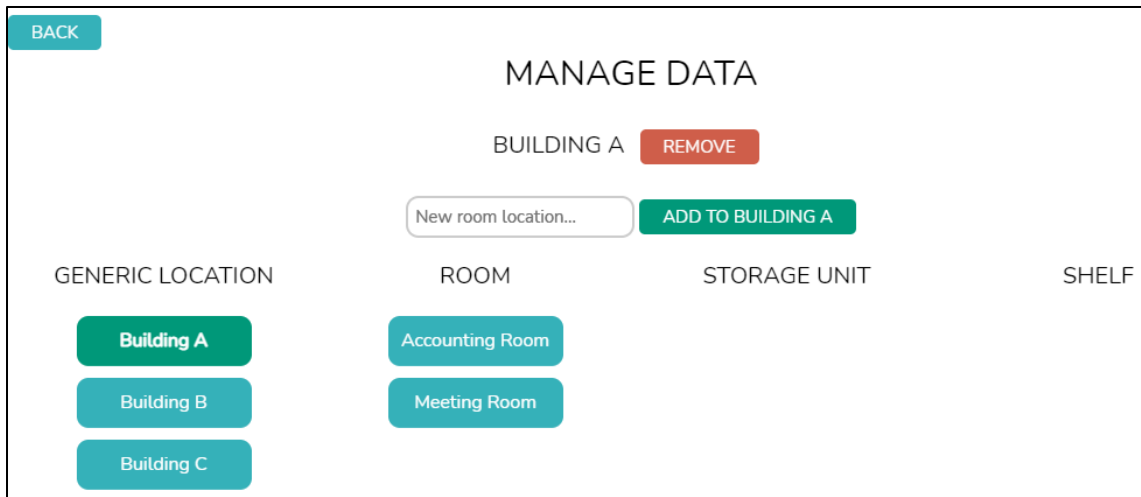
- ❖ The rest of the information displayed about the file security level access may only be changed through the 'Manage Users' section by an administrator.

Manage Data and Locations

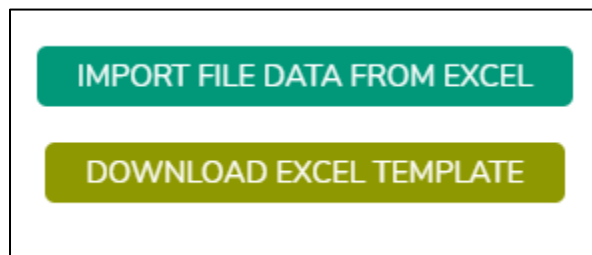
❖ From the main menu, simply select ‘Manage Data’ to reveal the options listed below:



❖ **Managing company data:** When adding a new company division, fill in the on-screen text field and simply click the ‘Add’ button. You may also update the current company name from here. For security purposes, you may not remove a subsidiary in this version of Cabinet.



- ❖ **Managing locations:** Do not click a sub-location if you intend to add a new ‘generic’ location. Make sure to make sub-location selections and read the updated button text as you select them to avoid confusion.
- ❖ **Adding Images:** You may attach, edit, or view images on any location in the ‘storage unit’ section.
- ❖ **Deleting Locations:** It is highly recommended that you **do not delete** locations, as you will not be able to search for them, even if they are redundant. If your company is migrating files extensively, please contact us to re-work your locations and make sure that all your files are updated correctly.



Importing File Data: You may import file data after downloading the provided template. Make sure there are no gaps in rows, and do not leave entire rows empty between files. There are certain rules setup in the spreadsheet columns to make sure your data is valid.

Exporting Data / Log Data

- ❖ The following information is about the 'Export Files' page of the program, accessible from the main menu:

EXPORT FILE DATA

Search By

Search Filter

Use Two Filters

- ❖ **Exporting Log / Audit Data:** To export the audit trail (list of actions performed in the system), simply click the button in the upper right-hand part of the 'Export Files' screen.

| Unique ID | Name | Fin Year | Status | Type | Location | Room | Storage Unit | Shelf | Added By | Security Level |
|----------------------|-------------------------------|----------------|---------|-------|------------|-----------------|------------------|---------------|-----------|--------------------------|
| E0dzyUqKLiUjI6gKYcF8 | testing approval addition | Not Applicable | Running | Asset | Building A | Accounting Room | Wooden Cabinet | Top Drawer | Raj Saini | General access (Level 1) |
| N5SYxXyDeArwUQM0dB6 | Testing autoo ID | Not Applicable | Running | Asset | N/A | N/A | N/A | N/A | John Doe | General access (Level 1) |
| O1HVO0u3wHwaAMvd7uGt | test file 5 | Not Applicable | Closed | Asset | Building A | Accounting Room | Test Cabinet | | Raj Saini | General access (Level 1) |
| OjUjIDv5XX7I8tMC9mtG | very first approval file | Not Applicable | Running | Asset | Building A | Accounting Room | Test Cabinet | | Raj Saini | General access (Level 1) |
| Td0Dfn30sSdHCQDIESQI | third and final approval file | Not Applicable | Running | Asset | N/A | N/A | N/A | N/A | Raj Saini | General access (Level 1) |
| aukktO1L4tjAB6HnHjTL | test file | Not Applicable | Closed | Asset | Building A | Accounting Room | Vertical Cabinet | Second Drawer | Raj Saini | General access (Level 1) |
| gloGVhARYH98D2d28OD | test file 4 | Not Applicable | Closed | Asset | Building A | Accounting Room | Test Cabinet | | Raj Saini | General access (Level 1) |

- ❖ **Exporting File Data:** To export file data, simply select search and filter files you want from the list and click the 'Export'. You may remove additional files easily from the excel spreadsheet generated. If you only want to export one file, simply search for that file specifically and then export it.

Adding Files

- ❖ Adding files can either be done through the **IMPORT** function described in ‘Manage Data and Locations’, or the ‘Add Files’ screen which is accessible from the main menu and described below.

BACK

ADD A NEW FILE

File ID Generated and provided after addition

File Name Limit of 200 chars

Company Name Demo Company

Financial Year Not Applicable

From mm/dd/yyyy

To mm/dd/yyyy

Type Asset

- ❖ To add a file, simply complete all the fields provided on screen. In most situations, the program will warn you when you make an error entering data.
- ❖ If the **Status is Running**, then you cannot have a ‘To’ date. If you accidentally provide a ‘To’ date, then simply click the ‘Back’ button and re-enter the screen to clear the data.
- ❖ **All files must have a name.** Hence, the file name field cannot be left blank.
- ❖ The ‘created on’ and ‘created by’ fields cannot be edited, even in the future.
- ❖ Once you add a file to the database, **it can be edited later** by users with sufficient permissions.

The screenshot shows a form with the following elements:

- Label: "Link To Soft Copy" followed by a text input field containing "Soft Copy Link" and a teal "VIEW" button.
- Label: "This file is only stored as a soft copy" with a checked checkbox.
- Label: "File Security Level" followed by a dropdown menu showing "General access (Level 1)".
- A teal "ADD" button at the bottom.

- ❖ If the file is only a soft copy file with a link, then make sure to check the box appropriately as shown above.
- ❖ The 'File Security Level' is used to filter the file and make it visible to users with specific permissions, as outlined in the 'Manage Users / Permissions' section. If a user who is not an administrator adds the file, then it is listed under the "Approve Files" screen and **will not be listed in the actual database** until it is approved.

Finding Files

FIND FILES

Search By

Search Filter

Use Two Filters

[SEARCH](#)

| Unique ID | Name | Fin Year | Status | Type | Location | Room | Storage Unit | Shelf | Added By | Security Level |
|----------------------|----------------------|----------|---------|-----------|------------|-----------------|------------------|------------|----------|--------------------------|
| 00w8w1Wj3UnDDqEf0GBR | Mass import File 91 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |
| 02XfUIEN6WVY3iK3T5K9 | Mass import File 379 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |
| 05USeLTuYPAavGL2MJH8 | Mass import File 281 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |
| 08hPqoqVahKaVn106IKH | Mass import File 380 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |
| 0CA9u8Qt2heh8IYHtpo1 | Mass import File 451 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |

[VIEW/EDIT FILE](#)

- ❖ This screen is accessible by clicking the “FIND FILES” button on the main menu.
- ❖ You may use one or two search filters as shown above to save time when finding a file. You may select a file and click the ‘View/Edit File’ button at the bottom to view all of the information and edit certain fields.
- ❖ Note that if you **accidentally select a file**, you may click the ‘Search’ button to clear the selection.
- ❖ If you want to add a file, refer to the ‘Adding Files’ section of this document.

| | | | | | | | | | | |
|----------------------|----------------------|---------|---------|-----------|------------|-----------------|------------------|------------|----------|--------------------------|
| 08hPqoqVahKaVn106IKH | Mass import File 380 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |
| 0CA9u8Qt2heh8IYHtpo1 | Mass import File 451 | 2001-02 | Running | Corporate | Building A | Accounting Room | Vertical Cabinet | Top Drawer | John Doe | General access (Level 1) |

[VIEW/EDIT FILE](#)

- ❖ A selected file is highlighted in yellow, as shown above.

Approving Files

APPROVE FILES

Search By

Search Filter

Use Two Filters

| Unique ID | Name | Fin Year | Status | Type | Location | Room | Storage Unit | Shelf | Added By | Security Level |
|-----------|------|----------|--------|------|----------|------|--------------|-------|----------|----------------|
|-----------|------|----------|--------|------|----------|------|--------------|-------|----------|----------------|

- ❖ This screen is accessible from the main menu by selecting the “Approve Files” button and is only selectable by users with administrative permissions.
- ❖ The table of files presented on this screen only appear here, and do not appear elsewhere until they are approved or rejected.
- ❖ To Approve or Reject a file, simply select it from the given list and use the appropriate buttons.
- ❖ A selected file is highlighted in the table.
- ❖ You may edit the file’s details using the “View / Edit File” button if you wish to modify the details and then approve it.

Manage Users / Permissions

MANAGE USERS

Search By

Search Filter

| Name | Permission Level | Email | File Access Level | Status |
|------------|------------------|-------------------------|-----------------------------|--------|
| [REDACTED] | File Maintainer | [REDACTED] | General access (Level 1) | Active |
| John Doe | Admin | raj.saini0423@gmail.com | Classified access (Level 3) | Active |

- ❖ The above screen is accessible from the “Manage Users” button on the main menu, which is only selectable by administrative users.
- ❖ You **cannot** manage or edit a user’s permissions if they have Classified (Level 3) access.
- ❖ To edit a user’s permissions (who has level 1 or 2 access), simply select their name from the table provided and click the “Manage User” button.
- ❖ **Deactivating a user:** To deactivate a user, simply use the “Deactivate user” button found at the bottom of the Manage User screen, as shown below.



❖ **Managing Users / Editing Permissions / Creating New Users:**

- Note that for managing and creating new users, the same screen will be provided.
- For creating users, an email will be sent to the e-mail address provided with a temporary password for login, as well as a verification email from which you should be able to set your password.
- Changing the permission standing will activate and de-activate certain allowed permissions, as outlined in the diagram below.

MANAGE USER

Full Name

Email

Permission standing

- File Maintainer
- File Maintainer
- Secure Accounting User
- Admin

Can view all non-restricted files

All files added require approval from Admins or Accounting Users

Cannot modify any existing file records

No access to other user accounts

Cannot modify images or edit location lists

(Option) Can explicitly be given Level 2 access to view restricted files

- ❖ A “File Maintainer” **can never** have Level 3 (Classified) access.
- ❖ A “Secure Accounting User” **has the option** to be granted Level 3 (Classified) access.
- ❖ An “Admin” has **all permissions**.

❖ The table below shows the color scheme for how permissions can be granted.

| Color | Meaning |
|---------------------------------------|--|
| Gray Circle with a white checkmark | Permission is given and cannot be taken away. |
| Blue Circle / Blue checkmark | Permission can be toggled on and off. |
| Gray Circle without a white checkmark | Permission cannot be given at all. |

❖ Below is a representation of what the color scheme looks like in the manage user / create user screen.

File Security Level

General access (Level 1)

Restricted access (Level 2)

Classified access (Level 3)

Additional User Options

Require approval from senior for all file records

Allow user to modify any file records they have access to

Allow user to export file data