

# Snapfile Guide

Long-Awaited **Burly** File Management Features in *Snapdone*™ Version 6

The Snapfile screen introduced in Snapdone Version 6 replaces the prior version's Snapsave and Snapopen screens. It expands file management beyond the confines of Microsoft Word, provides a boxful of intelligent searching tools, allows total flexibility of file organization (including unlimited folder levels), and wraps everything up in a supercharged but still effortlessly accessible interface.

## Don't Worry!

Despite its visual differences, the new Snapfile screen behaves very much like the old Snapsave and Snapopen screens. You will be able to use it immediately with little adjustment. But many new features are tucked away for use when you feel ready to explore.

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## Opening the Snapfile Screen



In Microsoft Word, click Snapopen, Snapsave, or Snapfile on the Snapdone tab.



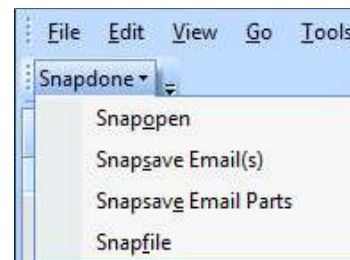
In Microsoft Excel, click Snapopen, Snapsave (with or without ID), or Snapfile on the Snapdone tab.



In Microsoft PowerPoint, click Snapopen, Snapsave or Snapfile on the Snapdone tab.



In Microsoft Outlook, click Snapopen, Snapsave (emails or email parts), or Snapfile on the Snapdone menu.



On the Windows Desktop, double-click the Snapfile icon.

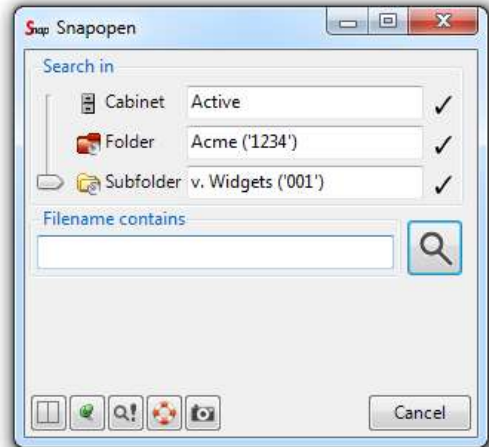


# The Look

## Organization

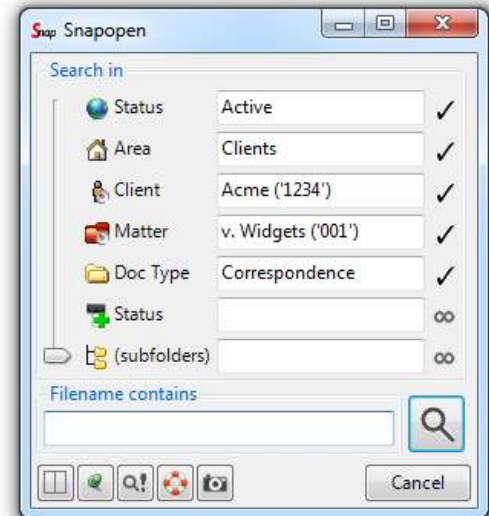
Since Snapdone allows each office to completely customize the organization of its files, the appearance of the Snapfile screen varies greatly from one office to the next.

**Example 1:** This structure duplicates the classic Cabinet\Folder\Subfolder organization found in earlier versions of Snapdone.



**Example 2:** This structure uses additional folder levels to categorize files more specifically.

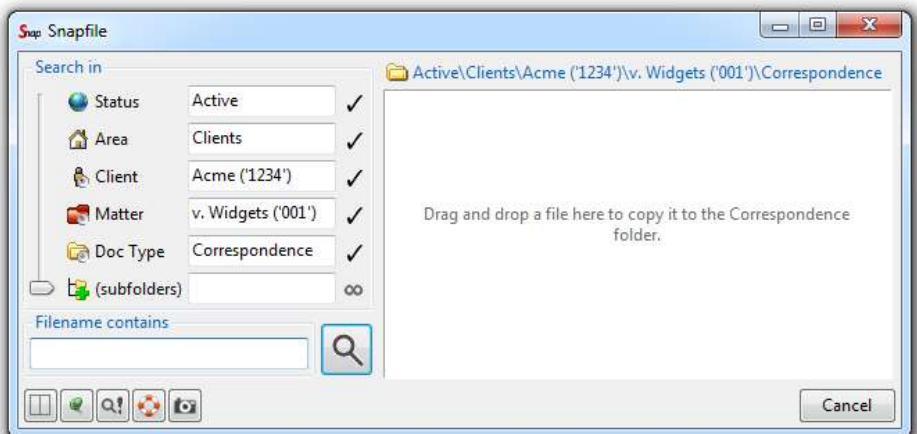
Most offices will use a combination of structures, rigidly organizing some areas and leaving others unrestricted for freeform use. For help designing your office's folder structure, click **Snapdone, Help, Administration** to see the Snapdone Administration manual.



## Modes

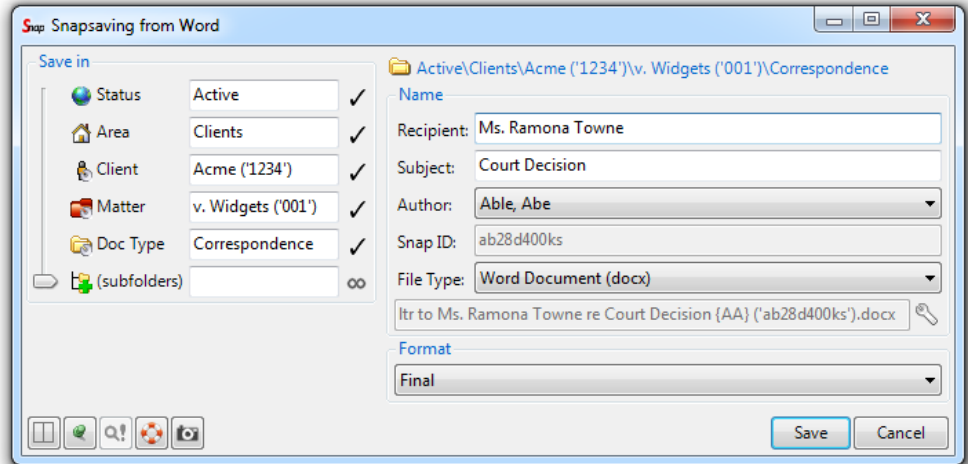
### Browsing ~

You are no longer limited to Snapsaving only Word documents. The Snapfile screen can be used to search for any type of file. And any type of file can be copied into the Snapdone file system by drag-dropping or copy-pasting.



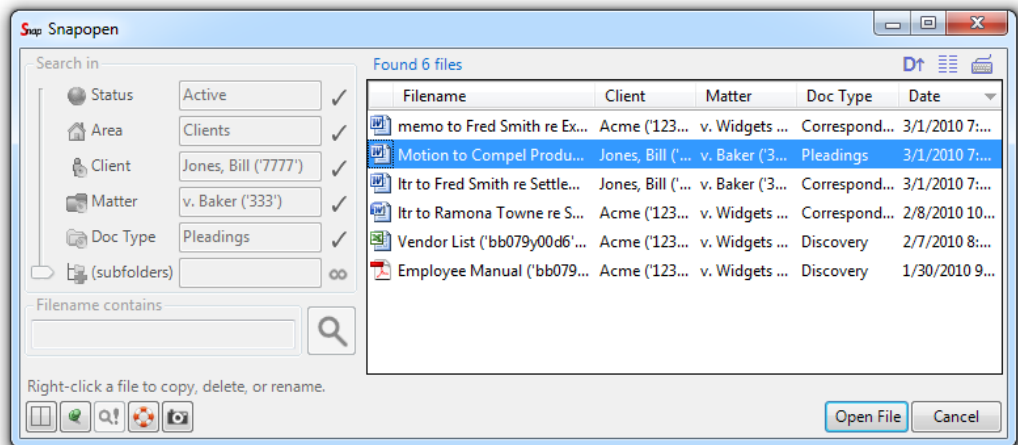
## Snapsaving ~

When Snapsaving files, half the screen is used to select a folder and the other half to name the file. Naming conventions for various types of documents are determined by your administrator, ranging from a simple Description field to a whole series of fields, as shown here.



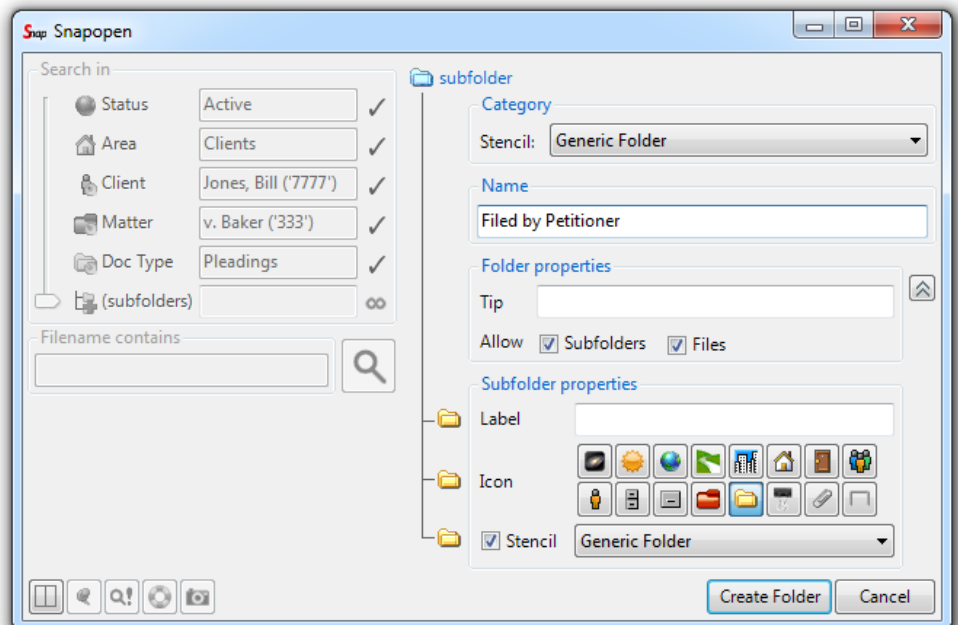
## Snapopening ~

When Snapopening files, half the screen is used to enter search criteria and the other half displays search results. Results are parceled into columns for quick browsing and sorting.



## Managing Folders ~

When creating or modifying folders, half the screen is used to locate the folder and the other half for naming and setting other folder properties.

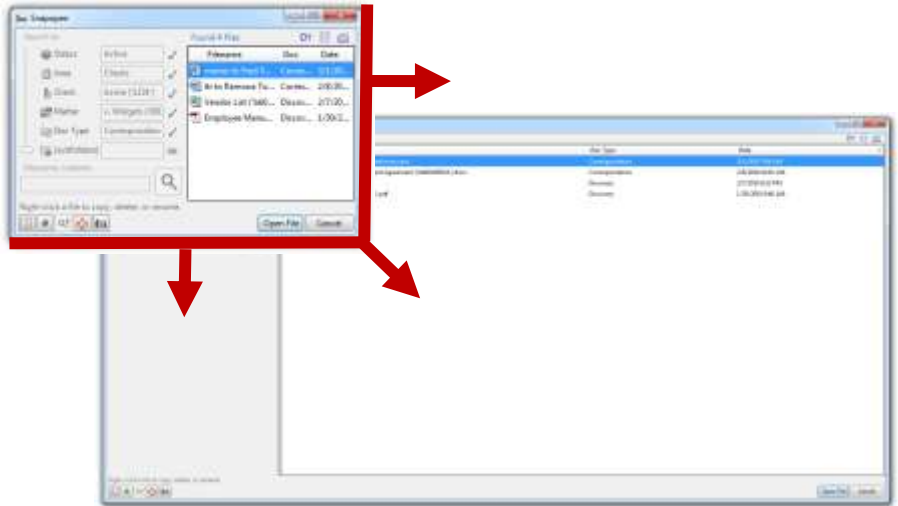


# But What's It Do?

## Screen Layout

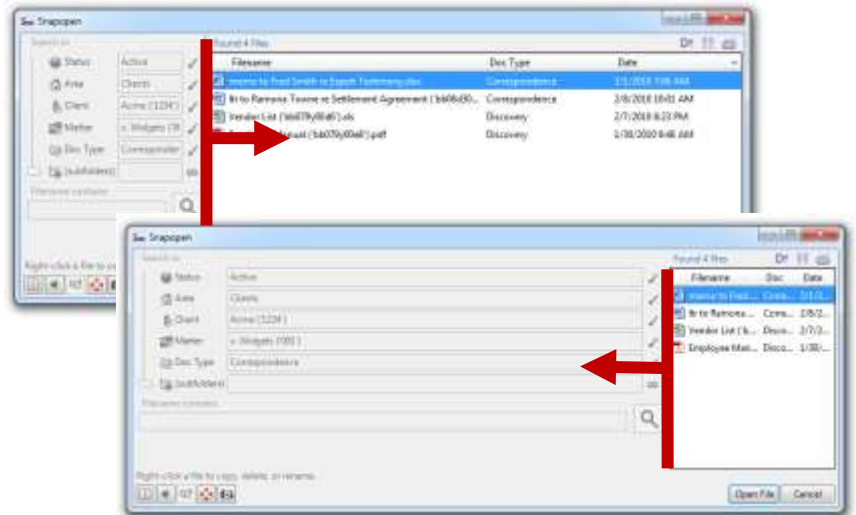
### Resizable Screen ~

The Snapfile screen can be resized by dragging its edges or corners.



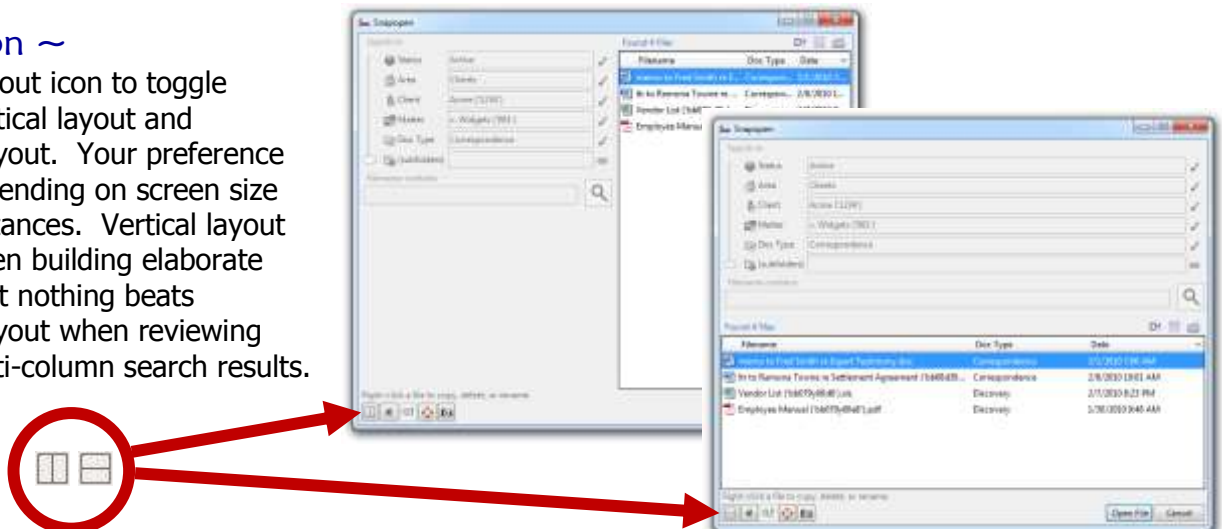
### Resizable Panels ~

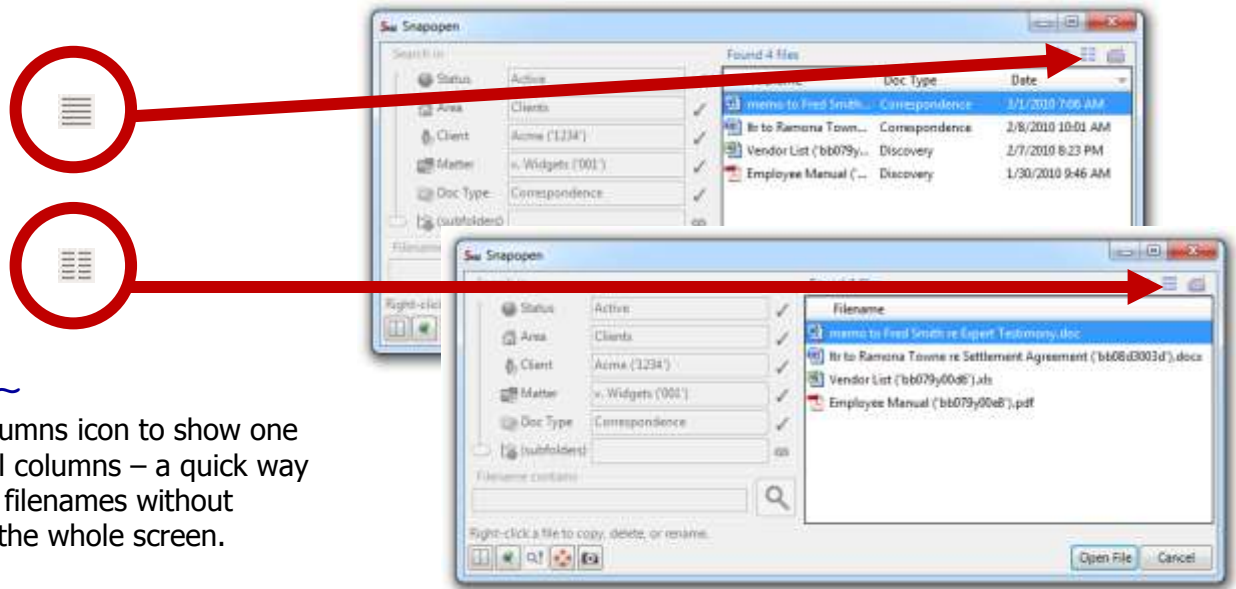
Panels within the Snapfile screen can be resized by dragging the border between panels.



### Orientation ~

Click the Layout icon to toggle between vertical layout and horizontal layout. Your preference will vary depending on screen size and circumstances. Vertical layout is handy when building elaborate searches, but nothing beats horizontal layout when reviewing detailed multi-column search results.





## Columns ~

Click the Columns icon to show one column or all columns – a quick way to read long filenames without rearranging the whole screen.

## Searching

### Multi-Word Searches ~

Whether searching for files or folders, multi-word searches now find items that contain all of the words in any order and with any intervening text.

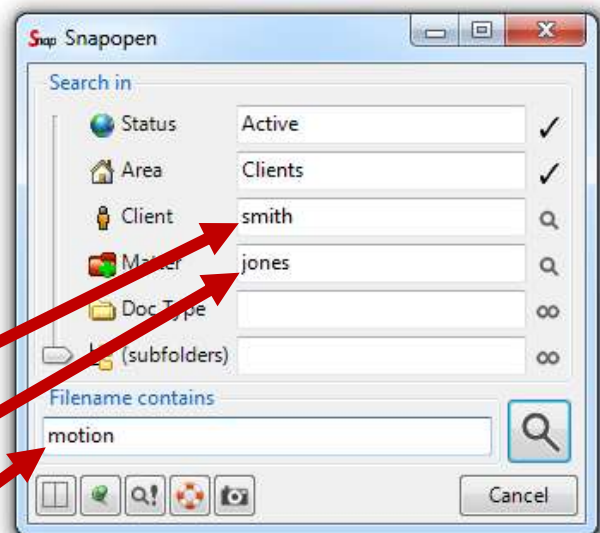
In previous versions of Snapdone, two steps would be required to find the four documents shown here. Step 1: search for **john**. Step 2: narrow down the results by searching for **smith**. The same four documents are now found in one step by searching for **john smith**.

ltr to **John Smith**.doc  
 ltr to **John A. Smith**.doc  
**Smithers, John** – Taxes.doc  
 Aeros**smith** by Dave **Johnson**.doc

### Multi-Level Searches ~

Searches can be performed on multiples levels at the same time. For example, suppose my boss asks for the motion filed last week in the Smith v. Jones case. There are several clients named Smith at my office, but I don't have to search separately through each of their client folders. I can get my results in one step by using the search pictured here to find all files where:

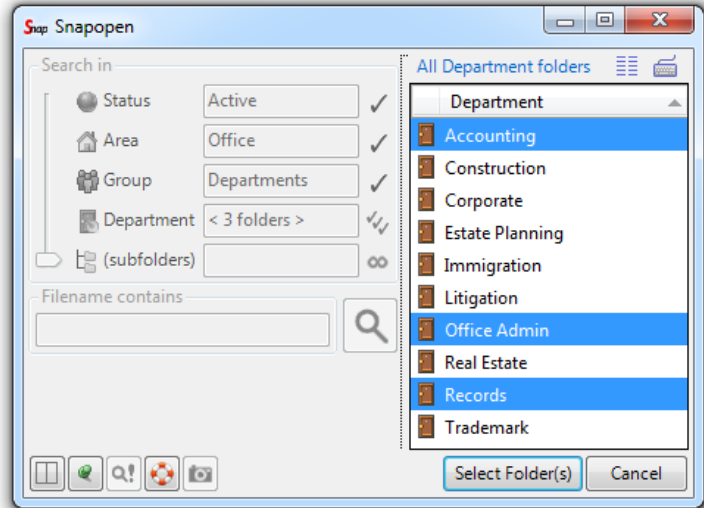
- (1) the Client folder contains the word **smith**;
- (2) the Matter folder contains the word **jones**;
- and
- (3) the filename contains the word **motion**.



### Hand-Picked Searches ~

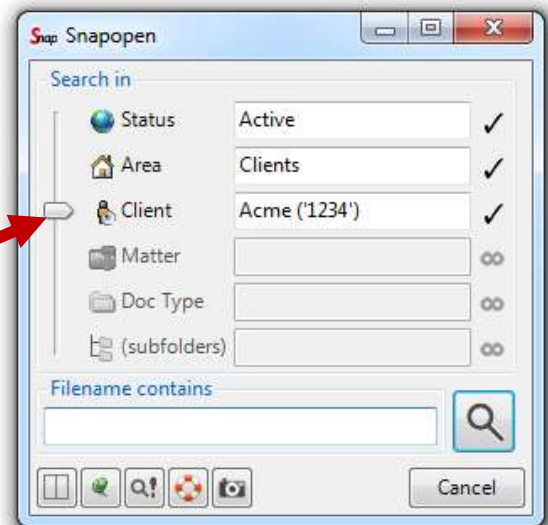
Searches can be restricted to particular folders. In this screenshot, the search includes 3 departments (Accounting, Office Admin, Records) but excludes the other 7 departments.

To select multiple folders, Ctrl+click each one or Shift+click to select a range.



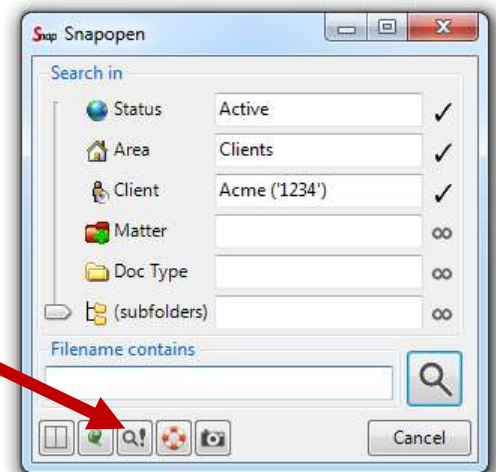
### Adjustable Search Depth ~

Use the slider to limit search depth. For example, in this screenshot files stored in the Smith client folder will be found, but files stored in any of the Matter folders within the Smith folder will *not* be found.

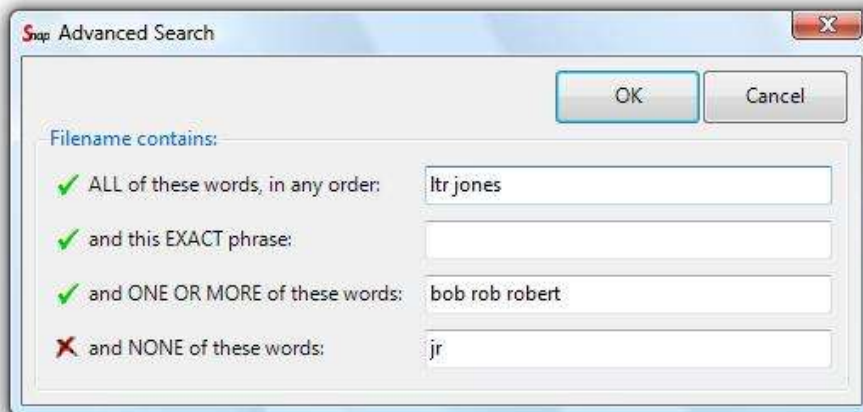


### Advanced (Boolean) Searches ~

For advanced searches, place the cursor in any search box and click the Advanced Search button. (Or right-click a search box and choose **Advanced Search.**)



Extravagantly detailed searches are easily entered. The one pictured here finds letters to Robert Jones no matter how informally he was addressed, but excludes letters to his son Bob Jr.



Your choices in the Advanced Search screen are translated into a Boolean search term in the Snapfile screen.

Advanced searches can be entered in several search boxes at once, if needed.

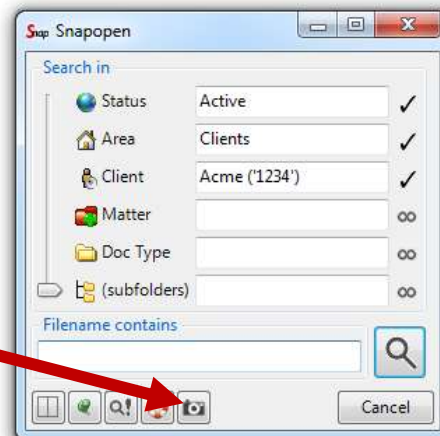


## Quick Access

### Snapshots (frontrunner for favorite feature) ~

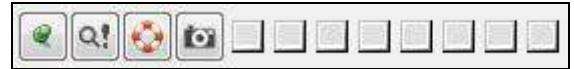
All of the search features described above can be combined to create some truly elaborate searches. Fortunately, these searches can be preserved in Snapshots for instant one-click access without laboriously recreating all of the search parameters – ideal for ongoing cases and periodic tasks.

Click the Camera icon to take a Snapshot of the current search or folder location.





Each Snapshot appears in a row beside the camera. Click any Snapshot to instantly return to the search or folder location that it captured. You can keep up to 32 Snapshots.



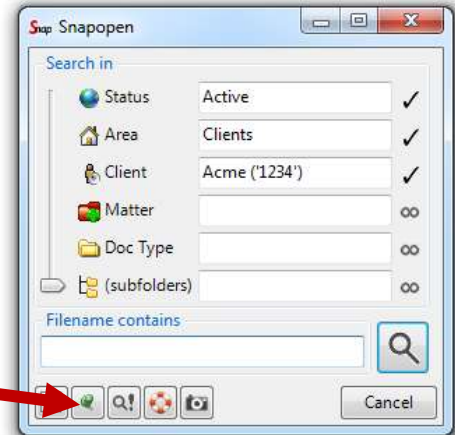
Snapshots can be arranged and tagged with colors, letters, and nicknames so they're easy to identify. For options, right-click on a Snapshot.



### Favorites ~

Even if you don't take a Snapshot, Snapdone keeps a history of every search performed and every file Snapsaved and Snapopened.

Click the Thumbtack icon to open the Recent Files and Searches screen.



File items open a recently Snapsaved or Snapopened file.

Add nicknames to frequently-used items for easy reference.

Email items track the default folder for emails from a particular sender.

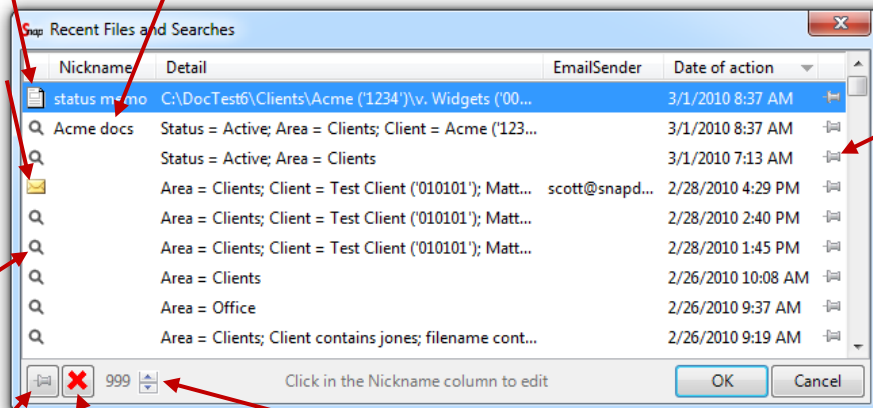
Magnifying glass items repeat a recent search.

Show or hide unpinned items.

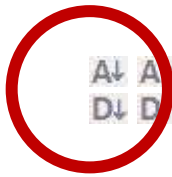
Remove unwanted items from the list.

Choose how many items should be remembered.

Pin your favorites to the list so they won't be removed if the list gets full.



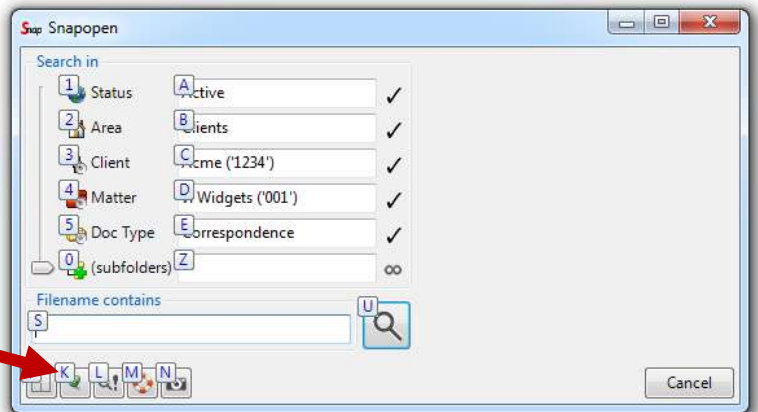
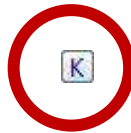
# Sorting



Click the Sorting icon to choose a default sort order (alpha, reverse alpha, date, reverse date). Or click column headings to sort at any time (this won't change the default sort order).

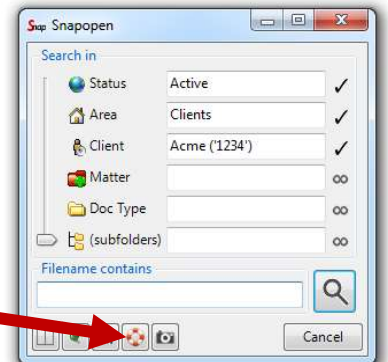
# Mousers and Keyboardists

**Keyboard Shortcuts:** If you prefer typing to clicking, use keyboard shortcuts by holding down **Alt** or **Ctrl** and pressing the indicated letter or number key.

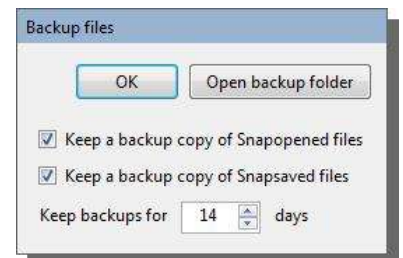


# Backups

Snapdone's backup capability is expanded, allowing you to choose what gets backed up and for how long. Click the Lifesaver icon to open the Backup Files screen.



Backups can be created every time a document is Snapopened or Snapsaved. This makes it easy to sift back through earlier drafts of any document. Click **Open backup folder** to access files that have been backed up.



# Naming Things

## Introducing ... Stencils

(\*\*APPLAUSE\*\*)

Snapdome Version 6 uses Stencils when naming folders and files. Stencils allow your administrator to define exactly how particular types of folders and files should be named.

For example, this Stencil for correspondence includes fields for document type, recipient, author, and subject matter.

A screenshot of a 'Name' dialog box for a correspondence stencil. It contains the following fields: 'Doc Type' (litr), 'Recipient' (Ramona Towne), 'Author' (Campbell, Scott), 'Subject' (Towne v. Livingston), and 'Extension' (Word Document (docx)). Below these fields is a preview of the generated filename: 'LTR to Ramona Towne from sac re Towne v. Livingston ('ba19bv)' with a wrench icon for manual editing.

And this Stencil for client folders includes fields for client name, controlling attorney, and client number.

A screenshot of a 'Name' dialog box for a client folder stencil. It contains the following fields: 'Client Name' (Smith, Fred), 'Attorney' (Fudd, Dale), and 'Client Number' (5555). Below these fields is a preview of the generated filename: 'Smith, Fred - DEF ('5555')' with a wrench icon for manual editing.

If multiple Stencils are available, they are listed here.

Name boxes vary depending on the requirements of each Stencil. Fill in each box to name the file or folder.

Most Stencils include a Snap ID (a unique 10-character serial number for the file being saved).

When Snapsaving from Word, Excel, or PowerPoint, all of their save formats are available: .txt, .rtf, .csv, etc.

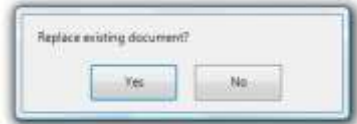
As Name boxes are filled in, a filename is automatically created. Click the wrench icon if you need to manually alter the filename.

When Snapsaving from Word or Excel, this determines the style of the ID code inserted in the document (draft or final).

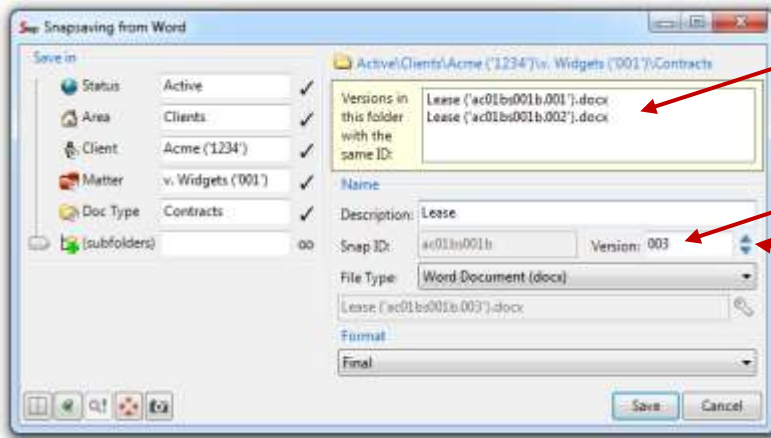
A screenshot of the 'Snap Snapsaving from Word' dialog box. On the left, a 'Save in' tree shows the path: Active\Clients\Acme ('1234')\v. Widgets ('001')\Correspondence. The 'Stencil' is set to 'Letter'. The 'Name' section contains: 'Recipient' (John Smith), 'Subject' (Trial Date), 'Author' (Able, Abe), 'Snap ID' (ac01bp008v), 'File Type' (Word Document (docx)), and a preview filename 'ltr to John Smith re Trial Date (AA) ('ac01bp008v').docx'. The 'Format' is set to 'Final'. At the bottom are 'Save' and 'Cancel' buttons.

# Versions

When re-Snapsaving a file, click **No** to save as a new file or a new version instead of replacing the original file.



Click **New Snap ID** to save as an unrelated document with a new Snap ID. Click **New Version** to save with the same Snap ID but apply a new Version ID, as shown below.



Previous versions of this document are listed for your reference.

A new version number is suggested.

Click the arrows to choose a different version number, or type your own version identifier (e.g., "redline" or "001v002") in the Version box.

# Emails

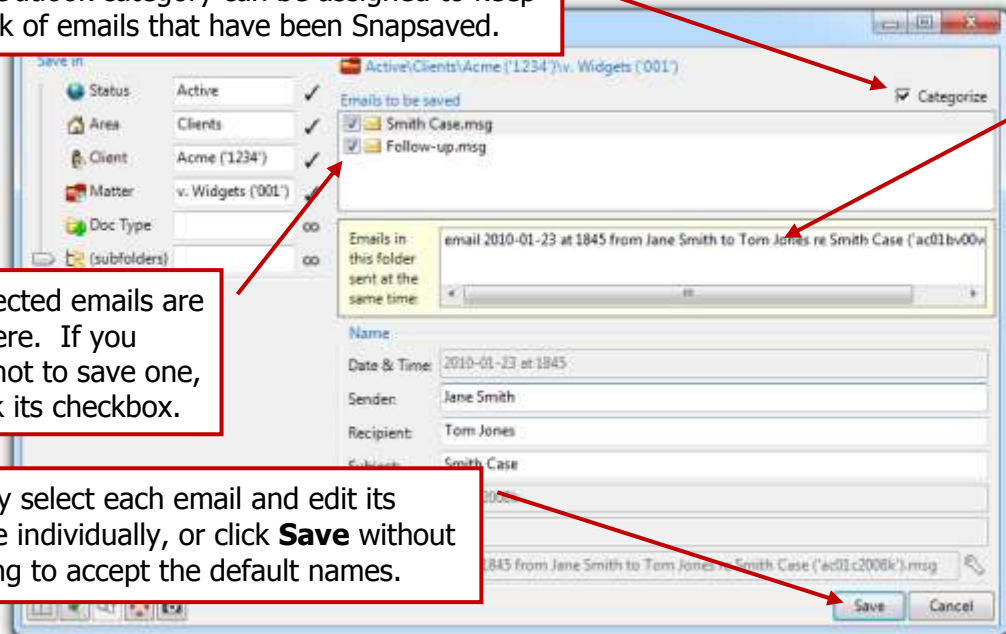
## Snapsaving One or More Emails ~

Select one or more emails in an Outlook mailbox and click **Snapdone, Snapsave Email(s)**.

An Outlook category can be assigned to keep track of emails that have been Snapsaved.

The selected emails are listed here. If you decide not to save one, uncheck its checkbox.

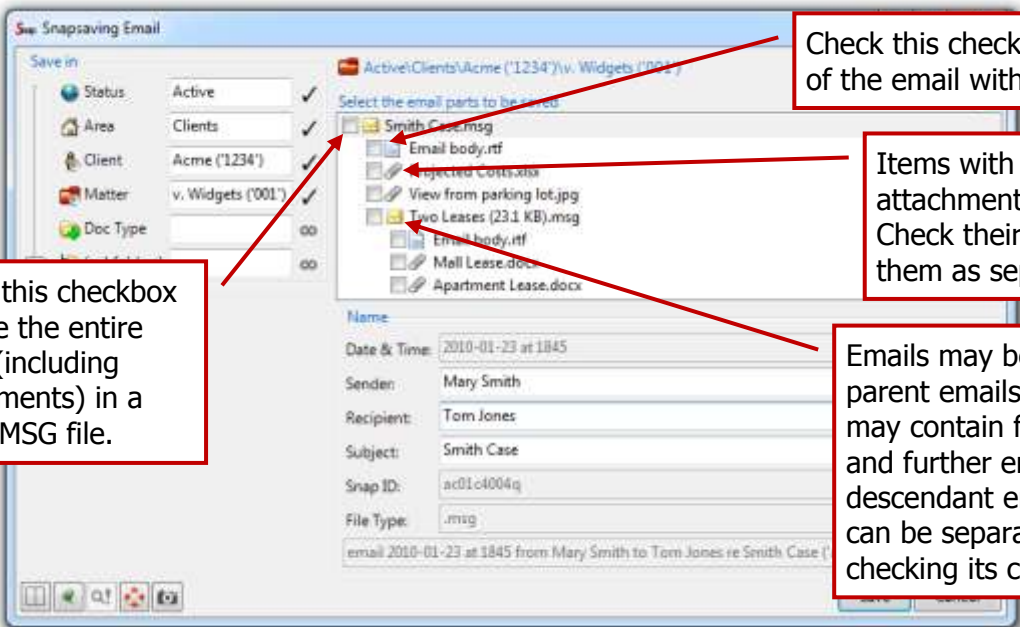
You may select each email and edit its filename individually, or click **Save** without reviewing to accept the default names.



If this folder already contains emails that were sent the same day and time, they are listed. This helps prevent multiple savings of an email that was cc'd to several individuals at your office.

## Snapsaving Email Parts ~

To separately save various parts of an email, select the email in an Outlook mailbox and click **Snapdone**, **Snapsave email parts**.



The screenshot shows the 'Snapsaving Email' dialog box. On the left, there are fields for 'Save in' with a tree view showing 'Active', 'Clients', 'Acme ('1234')', 'v. Widgets ('001')', and 'Doc Type'. The main area shows a list of email parts to be saved, including 'Smith Case.msg', 'Email body.rtf', 'Rejected Costs.xlsx', 'View from parking lot.jpg', 'Two Leases (23.1 KB).msg', 'Email body.rtf', 'Mall Lease.docx', and 'Apartment Lease.docx'. Each item has a checkbox. Below the list, there are fields for 'Name', 'Date & Time', 'Sender', 'Recipient', 'Subject', 'Snap ID', and 'File Type'. A search bar is at the bottom.

Check this checkbox to save the body of the email without attachments.

Items with paperclip icons are attachments to the parent email. Check their checkboxes to save them as separate files.

Check this checkbox to save the entire email (including attachments) in a single MSG file.

Emails may be contained within parent emails, and they in turn may contain further attachments and further emails. Each descendant email and attachment can be separately saved by checking its checkbox.

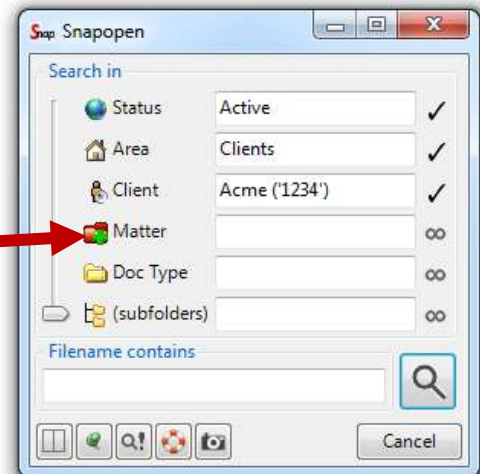
## How To ...

### Create a Folder ~

First select the folder in which the new folder will be created (in this screenshot, the Client folder named "Acme").

Click the green + icon to open the folder properties panel.

(If the green + does not appear, the folder is restricted and can only be modified by your Snapdone administrator.)



Fill in the Name boxes, then click **Create Folder**.

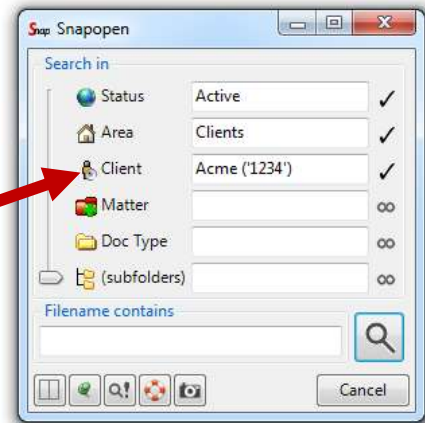


## Rename a Folder ~

First select the folder to be renamed (in this screenshot, the Client folder named "Acme").

Click the wrench icon to open the folder properties panel.

(If the wrench does not appear, the folder is restricted and can only be modified by your Snapdone administrator.)



Type a new name for the folder and click **Save Folder Changes**.



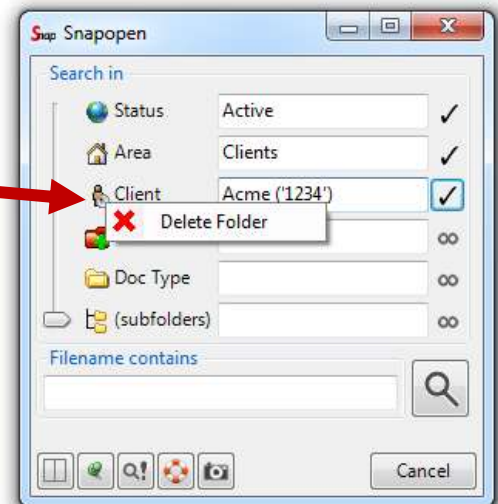
## Delete a Folder ~

First select the folder to be deleted (in this screenshot, the Client folder named "Acme").

Right-click the folder's icon and choose **Delete Folder**.

If the folder contains files or subfolders, you will be notified that it is not empty and cannot be deleted.

(If the **Delete Folder** option does not appear, the folder is restricted and can only be deleted by your Snapdone administrator.)



## Rename or Delete a File ~

In the Found Files list, right-click on the file and choose **Rename** or **Delete**.



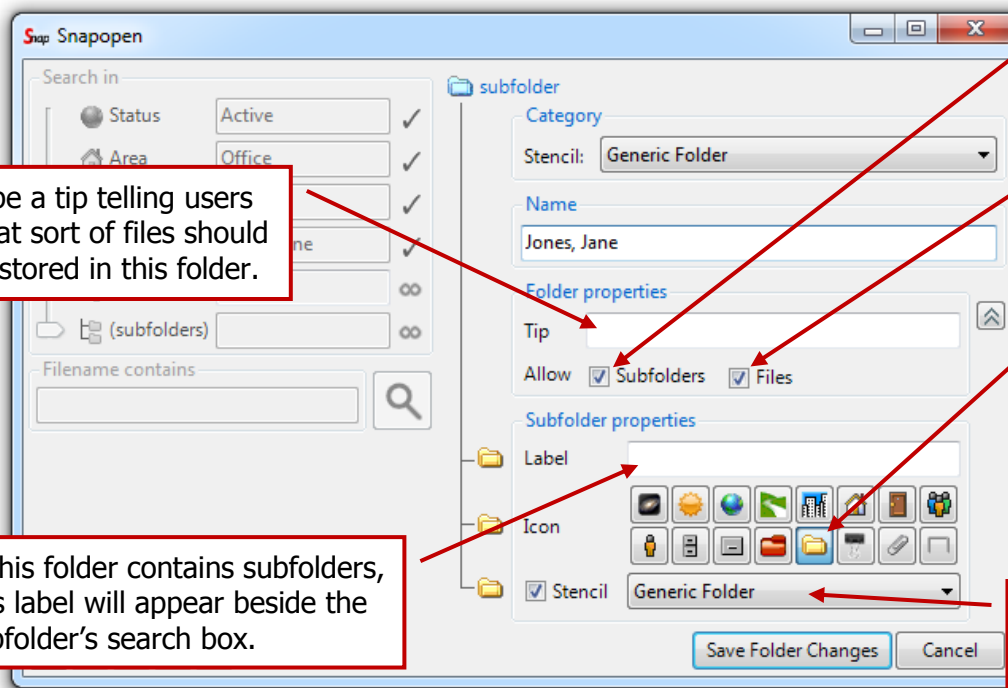
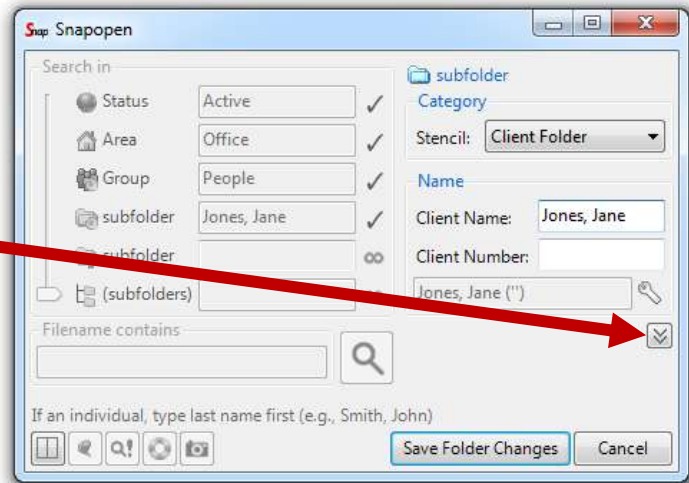
## Change Folder/Subfolder Properties ~

The administrator at your office determines overall file organization, but in some areas you may create "freeform" folders and set their properties.

First open the folder properties panel as shown in *Rename a Folder* above.

Then click the **More** icon to show more folder properties.

(If the **More** icon does not appear, the folder is restricted and can only be modified by your Snapdone administrator.)



Type a tip telling users what sort of files should be stored in this folder.

If this folder contains subfolders, this label will appear beside the subfolder's search box.

Can subfolders be created in this folder?

Can files be saved in this folder?

If this folder contains subfolders, this icon will appear beside the subfolder's search box.

You may specify a Stencil to be used when naming subfolders within this folder.

~ fin ~

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