



# DATA SYSTEMS MANAGEMENT, INC



## Pronto**DMS** – FIN

FINancial Edition

**D**ocument **M**anagement **S**ystem

Simple, Secure, Searchable, Anywhere, Anytime,

**Unlimited User**, Cloud Browser Access to Documents & Media



**DSM is a locally owned Mississippi Company headquartered in Clinton, MS who has been supplying software solutions to Customers for over 33 years**

# PAPER PAIN

File Storage		\$1,250/YR per 5 Drawer File
Misfile		\$120 per Misfile
Security Backup		\$12/YR per Box

# <https://prontodms.dsmgov.com> Login

Pronto DMS is hosted on the cloud, an unlimited number of users can access the system from any browser. Public Access is also an option.

## Enter Credentials to Continue

Organization:

Username:


Password:

Login

[Forgot Password](#)

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# Search for Vendor "Dish Network" Invoices



Logout

Inquiry

Worklist

Upload

Batch Upload

Batch Maintenance

Query

Query Builder

Settings

Folder: Accounts Payable
Form: Invoices
Search
Reset
Help

Find: 
File: 
From Date: 
To Date: 
Person:

Vendor: 
Vendor Name: dish network
Project Number:

Requisition Number: 
PO Number: 
Invoice:

Invoice Description: 
From Invoice Amount: 
To Invoice Amount:

From Invoice Date: 
To Invoice Date:

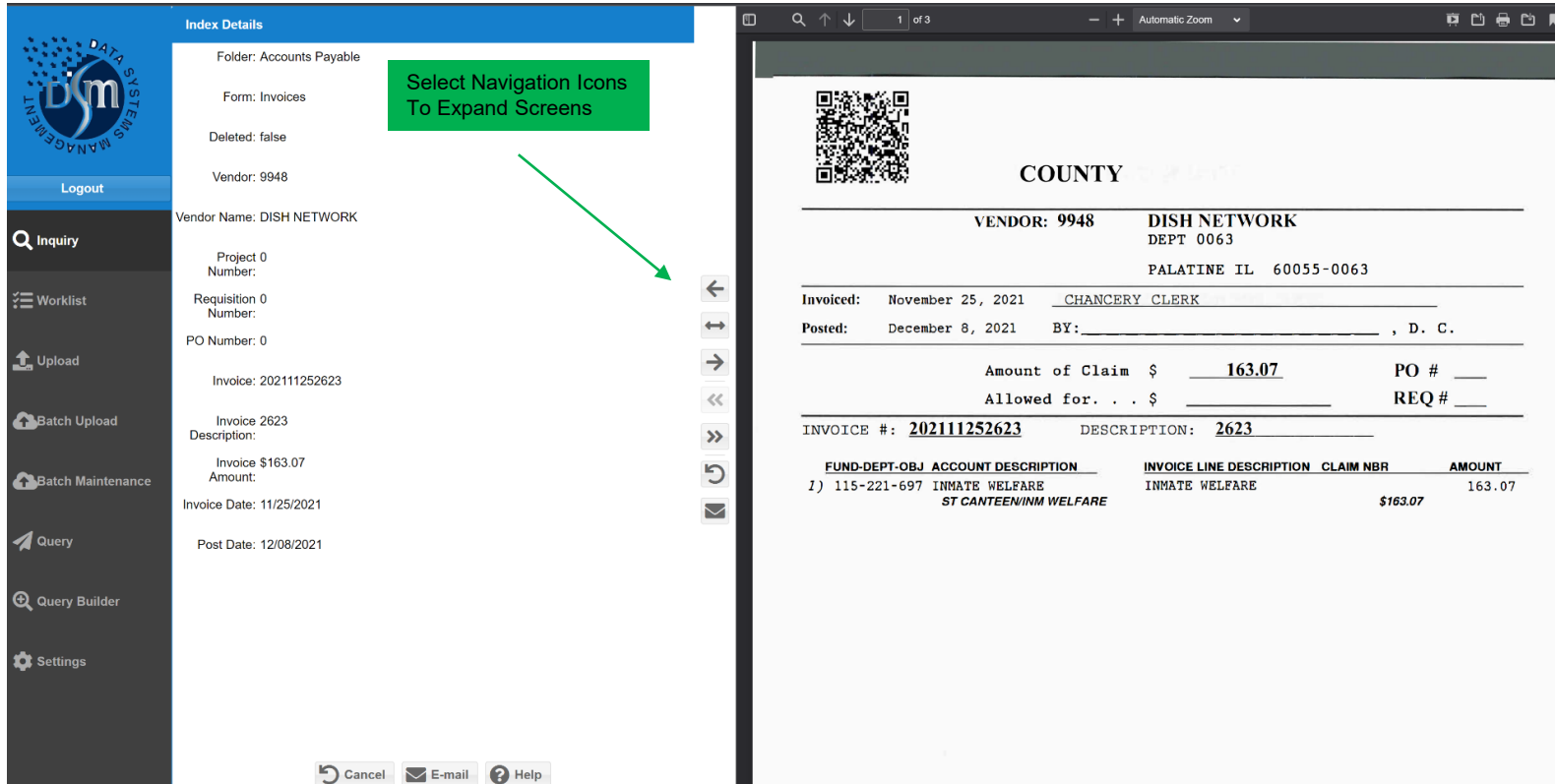
From Post Date: 
To Post Date:

**Pronto DMS** provides an electronic file cabinet that contains scanned documents and multiple searchable indexes to the documents.

	Details	File Name
👁️ ⬇️ 📄 ✉️	<b>Vendor:</b> 9948 <b>Vendor Name:</b> DISH NETWORK <b>Project Number:</b> 0 <b>Requisition Number:</b> 0 <b>PO Number:</b> 0 <b>Invoice:</b> 202111252623 <b>Invoice Description:</b> 2623 <b>Invoice Amount:</b> \$163.07 <b>Invoice Date:</b> 11/25/2021 <b>Post Date:</b> 12/08/2021	dish-network-nov2021-1.pdf-1.PDF
👁️ ⬇️ 📄 ✉️	<b>Vendor:</b> 9948 <b>Vendor Name:</b> DISH NETWORK <b>Project Number:</b> 0 <b>Requisition Number:</b> 0 <b>PO Number:</b> 0 <b>Invoice:</b> 81592623-004 <b>Invoice Description:</b> WCCRCF-22062 HWY 25 N <b>Invoice Amount:</b> \$158.05 <b>Invoice Date:</b> 10/26/2021 <b>Post Date:</b> 10/26/2021	dish-network-oct2021.pdf-1.PDF
👁️ ⬇️ 📄 ✉️	<b>Vendor:</b> 9948 <b>Vendor Name:</b> DISH NETWORK <b>Project Number:</b> 0 <b>Requisition Number:</b> 0 <b>PO Number:</b> 0	dish-network-nov2021.pdf-1.PDF

# Select "eyeball" to View Documents

Claims Jacket Cover Page  
With Special Barcode



The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains navigation icons for Inquiry, Worklist, Upload, Batch Upload, Batch Maintenance, Query, Query Builder, and Settings. The main content area is split into two panels. The left panel, titled 'Index Details', shows information for a vendor named 'DISH NETWORK' and an invoice for \$163.07. A green box with the text 'Select Navigation Icons To Expand Screens' and a green arrow points to a vertical column of navigation icons (back, forward, search, refresh, etc.) on the right side of this panel. The right panel shows a 'Claims Jacket Cover Page' for 'COUNTY CHANCERY CLERK'. It features a QR code, the vendor name 'DISH NETWORK', and invoice details including the date 'November 25, 2021' and amount '\$ 163.07'. A table at the bottom lists invoice line items.

FUND-DEPT-OBJ	ACCOUNT DESCRIPTION	INVOICE LINE DESCRIPTION	CLAIM NBR	AMOUNT
1) 115-221-697	INMATE WELFARE	INMATE WELFARE		163.07
	ST CANTEEN/INM WELFARE		\$163.07	



## Print; or eMail Document to Multiple People

E-mail Index ✕

+ Add E-mail

e-mail address

al@altheriot.com


alfred@alfredtheriot.com


al@everythink.biz

Cancel Send


## Example of Sent eMail

Mail   Contacts   Calendar   Tasks   Briefcase   Preferences   Document attach 

Close   Reply   Reply to All   Forward   Delete   Spam       Actions 

 **Document attached from Al Theriot at Bayou Bliss Financials** December 25, 2021 10:36 AM

From: [noreply2@dsmgov.awsapps.com](mailto:noreply2@dsmgov.awsapps.com)

 [dish-network-nov2021-1.pdf-1.PDF](#) (609.6 KB) [Preview](#) | [Download](#) | [Briefcase](#) | [Remove](#)

[THIS IS AN AUTOMATED MESSAGE - PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL]

Attached is the file associated with Index f5112a6209ff43f28b7ec4888d7b4a36 recorded by Bayou Bliss Financials.

Please send all replies to Al Theriot via e-mail at [al@altheriot.com](mailto:al@altheriot.com).

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# Full Text Search for “workboots” in All Documents

The screenshot displays a web application interface for document search. On the left is a dark sidebar with navigation options: Logout, Inquiry, Worklist, Upload, Batch Upload, Batch Maintenance, Query, Query Builder, and Settings. The top left features the 'DSM DATA SYSTEMS MANAGEMENT' logo. The main content area has a search header with 'Folder: Accounts Payable' and 'Form: Invoices'. Search controls include 'Search', 'Reset', and 'Help' buttons. Below these are input fields for 'Find: workboots', 'File:', 'From Date:', 'To Date:', and 'Person:'. Further down are fields for 'Vendor:', 'Vendor Name:', 'Project Number:', 'Requisition Number:', 'PO Number:', 'Invoice:', 'Invoice Description:', 'From Invoice Amount:', 'To Invoice Amount:', 'From Invoice Date:', 'To Invoice Date:', 'From Post Date:', and 'To Post Date:'. A search results table is shown below, with columns for 'Form', 'Details', and 'File Name'. The table contains one row for 'Invoices' with the following details: Vendor: 0897, Vendor Name: CAPITAL ONE WALMART, Project Number: 0, Requisition Number: 0, PO Number: 0, Invoice: 02621, Invoice Description: SHOES/WORK BOOTS, Invoice Amount: \$221.78, Invoice Date: 10/07/2021, and Post Date: 11/02/2021. The file name is 'capital-one-walmart-oct2021.PDF'.

Form	Details	File Name
Invoices	Vendor: 0897 Vendor Name: CAPITAL ONE WALMART Project Number: 0 Requisition Number: 0 PO Number: 0 Invoice: 02621 Invoice Description: SHOES/WORK BOOTS Invoice Amount: \$221.78 Invoice Date: 10/07/2021 Post Date: 11/02/2021	capital-one-walmart-oct2021.PDF

# Results of “workboots” Search

The screenshot displays a document viewer interface with a search bar at the top containing the text "workboots". The search results show "1 of 2 matches". A green callout box contains the text: "Shows exact location of search word and number of instances in the document".

The document being viewed is a receipt from Walmart. The receipt includes the following information:

- Walmart logo and name
- Customer ID: 0891
- Transaction ID: 115-221-697
- Item list:

Item	Quantity	Price
M SHOES	060538809191	23.78
M WORKBOOTS	060538817811	34.76
M SHOES	06811312/468	34.97
M SHOES	060538809194	23.78
M SHOES	06811312/471	34.97
M WORKBOOTS	060538817812	34.76
M WORKBOOTS	060538817815	34.76
<b>SUBTOTAL</b>		<b>221.78</b>

The receipt also includes a barcode, the date and time (10/07/21 17:16:38), and the text "\*\*\*CUSTOMER COPY\*\*\*".

# Document Notes



Logout

- Inquiry
- Worklist
- Upload
- Batch Upload
- Batch Maintenance
- Query
- Query Builder
- Settings

Index Details
Document Log
Notes

Note Text: INDIVIDUAL DOCUMENT NOTES CAN BE ADDED FOR PUBLIC OR PRIVATE VIEW

Private?  Viewable in Internal Inquiry?  Add Note

Note Text

No notes on file



## COUNTY

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**VENDOR: 2922**    **G & O SUPPLY COMPANY**  
 G & O SUPPLYCO., INC.  
 1344 D.L. COLLUMS DRIVE  
 TUPELO MS 38801

**Invoiced:**    July 28, 2021    CHANCERY CLERK

**Posted:**    December 6, 2021    BY: \_\_\_\_\_ , D. C.

Amount of Claim \$    30,289.60

Allowed for. . . \$    \_\_\_\_\_

**PO #**    42215

**REQ #**    42215

**INVOICE #:**    42215WCM    **DESCRIPTION:**    COLVERTS


FUND-DEPT-OBJ	ACCOUNT DESCRIPTION	INVOICE LINE DESCRIPTION	CLAIM NBR	AMOUNT
1)	165-305-634	CULVERTS	CULVERTS	30,289.60
		<i>DISTRICT FIVE BRIDGE AND CULVERT</i>		<i>\$30,289.60</i>

# Document Log

Audit Logs <span data-bbox="1619 132 1657 172">✕</span>			
User	Log Added	Log Type	Log Text
Al Theriot	12/25/2021 09:20:01 PM	VIEW	User viewed record.
Al Theriot	12/25/2021 09:18:31 PM	VIEW	User viewed record.
Al Theriot	12/23/2021 05:38:19 PM	VIEW	User viewed record.
Al Theriot	12/23/2021 05:37:51 PM	VIEW	User viewed record.
Al Theriot	12/23/2021 05:34:57 PM	VIEW	User viewed record.
Al Theriot	12/23/2021 05:32:35 PM	VIEW	User viewed record.
Annette Walker	12/21/2021 01:12:26 PM	VIEW	User viewed record.
Annette Walker	12/21/2021 01:12:25 PM	UPDATE	A new file was uploaded.
Annette Walker	12/21/2021 01:09:42 PM	VIEW	User viewed record.
Administrator	12/20/2021 10:02:49 AM	VIEW	User viewed record.
Annette Walker	12/16/2021 03:15:25 PM	VIEW	User viewed record.
Melinda Jaynes	12/16/2021 03:03:17 PM	VIEW	User viewed record.
Annette Walker	12/16/2021 02:47:07 PM	VIEW	User viewed record.

Close

# Design & Save Your Own Index QUERY



Logout

Inquiry

Worklist

Upload

Batch Upload

Batch Maintenance

Query

Query Builder

Settings


Description:  Disabled?  Find Missing?

Drag and Drop Available Items to Select Fields and Where Conditions.

Available Fields	Available Folders	Available Forms
Field	Description	Description
Fiscal Year (Fiscal Year)	Accounts Payable	Accounts Payable - Invoices
Header Description (Header Description)	General Ledger	General Ledger - Receipts
Invoice (Invoice)		
Invoice Amount (Invoice Amount)		
Invoice Date (Invoice Date)		
Invoice Description (Invoice Description)		
PO Number (PO Number)		
Post Date (Post Date)		
Post Date (Post Date)		
Project Number (Project Number)		

Select Fields	Where Conditions
Field	Field
<input type="checkbox"/> Vendor (Vendor ID)	<input type="checkbox"/> Form
<input type="checkbox"/> Vendor Name (Vendor Name)	Level
<input type="checkbox"/> Invoice Date (Invoice Date)	AND/OR
<input type="checkbox"/> Invoice Amount (Invoice Amount)	Not
	Value/From
	To

# QUERY of AP Invoice Folder Index



Logout

Inquiry

Worklist

Upload

Batch Upload

Batch Maintenance

Query

Query Builder

Settings

Query: Vendor List Refresh Download List (5) Help

	Folder	Form	Vendor	Vendor Name	Invoice Date	Invoice Amount	Added By	Added
	Accounts Payable	Invoices	0897	CAPITAL ONE WALMART	2021-10-07	221.78	Annette Walker	12/16/2021 02:46:33 PM
	Accounts Payable	Invoices	2922	G & O SUPPLY COMPANY	2021-07-28	30289.60	Annette Walker	12/16/2021 02:35:34 PM
	Accounts Payable	Invoices	9948	DISH NETWORK	2021-11-25	163.07	Al Theriot	12/15/2021 10:01:02 AM
	Accounts Payable	Invoices	9948	DISH NETWORK	2021-10-26	158.05	Al Theriot	12/15/2021 10:00:33 AM
	Accounts Payable	Invoices	9948	DISH NETWORK	2021-11-25	201.07	Al Theriot	12/15/2021 09:21:06 AM

**Download the QUERY to an Excel File**

File name: Vendor\_List\_1640617078880.csv

Save as type: Microsoft Excel Comma Separated Values File (\*.csv)


## ProntoDMS Advantages

FEATURE	BENEFIT
Graphical Browser Application	<i>Windows Free</i>
User Defined Folders & Index	<i>You make the rules, not the system</i>
User Defined Security with Logs	<i>Who accessed What, When</i>
User Defined Access to Documents	<i>Share docs <b>without eMail size limits</b></i>
Store ANY Media Type	<i>Web Links, Spreadsheets, Pictures</i>
<b>FULL TEXT OCR SEARCH</b>	<i>Never lose a doc with a misfile</i>
<b>QUERY</b>	<i><b>Generate Custom Lists &amp; Reports</b></i>





## 2 - Scan & Upload Documents via Batch Maintenance with Barcode




Logout

- Inquiry
- Worklist
- Upload
- Batch Upload
- Batch Maintenance**
- Query
- Query Builder
- Settings

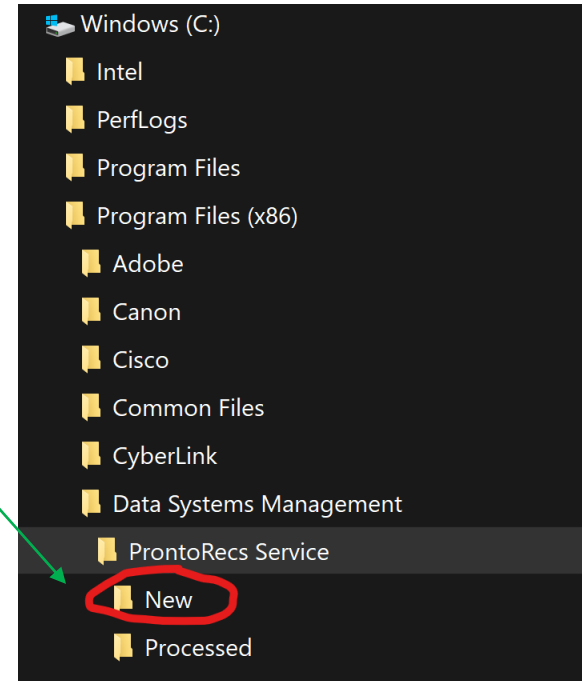
Refresh  Show History

	Batch Status	File	Document Count	Page Count	Added Date	Added By
	New	capital-one-walmart-nov2021.PDF	1	6	12/16/2021 02:45:23 PM	ATHERIOT
	New	dish-network-sep2021.PDF	1	3	12/15/2021 10:10:55 AM	ATHERIOT




### 3 – Documents Sent to “New” Watched Folder

Name	Date modified	Type	Size
<input checked="" type="checkbox"/> capital-one-walmart-nov2021.PDF	12/15/2021 10:44 AM	Adobe Acrobat D...	579 KB
<input checked="" type="checkbox"/> capital-one-walmart-oct2021.PDF	12/21/2021 1:11 PM	Adobe Acrobat D...	191 KB
<input checked="" type="checkbox"/> dish-network-nov2021.pdf	12/15/2021 9:17 AM	Adobe Acrobat D...	543 KB
<input checked="" type="checkbox"/> dish-network-nov2021-1.pdf	12/15/2021 9:30 AM	Adobe Acrobat D...	578 KB
<input checked="" type="checkbox"/> dish-network-oct2021.pdf	12/15/2021 9:35 AM	Adobe Acrobat D...	730 KB
<input checked="" type="checkbox"/> dish-network-sep2021.PDF	12/15/2021 10:09 AM	Adobe Acrobat D...	663 KB
<input checked="" type="checkbox"/> east-ms-electric-nov2021-jail.PDF	12/15/2021 4:33 PM	Adobe Acrobat D...	288 KB
<input checked="" type="checkbox"/> east-ms-electric-nov2021-visitation.PDF	12/15/2021 4:37 PM	Adobe Acrobat D...	308 KB
<input checked="" type="checkbox"/> east-ms-electric-oct2021-beat3.PDF	12/15/2021 4:36 PM	Adobe Acrobat D...	315 KB
<input type="checkbox"/> east-ms-electric-sep2021-jail.PDF	12/15/2021 4:56 PM	Adobe Acrobat D...	285 KB
<input type="checkbox"/> G&O-supply-july2021-culverts.PDF	12/15/2021 4:41 PM	Adobe Acrobat D...	199 KB
<input type="checkbox"/> G&O-supply-nov2021-colverts.PDF	12/16/2021 4:12 PM	Adobe Acrobat D...	685 KB
<input type="checkbox"/> r-securus-1.pdf	12/21/2021 4:22 PM	Adobe Acrobat D...	194 KB
<input type="checkbox"/> r-securus-2.pdf	12/21/2021 4:25 PM	Adobe Acrobat D...	204 KB
<input type="checkbox"/> r-securus-3.pdf	12/21/2021 4:27 PM	Adobe Acrobat D...	279 KB
<input type="checkbox"/> r-state of ms.pdf	12/21/2021 4:31 PM	Adobe Acrobat D...	280 KB
<input type="checkbox"/> r-tn valley authority.pdf	12/21/2021 4:35 PM	Adobe Acrobat D...	218 KB
<input type="checkbox"/> r-us corrections.pdf	12/21/2021 4:36 PM	Adobe Acrobat D...	170 KB



## 4 – Review Uploaded Documents




Logout

- Inquiry
- Worklist
- Upload
- Batch Upload
- Batch Maintenance
- Query
- Query Builder
- Settings

Refresh  Show History

	Batch Status	File	Document Count	Page Count	Added Date	Added By
	New	capital-one-walmart-nov2021.PDF	1	6	12/16/2021 02:45:23 PM	ATHERIOT
	New	dish-network-sep2021.PDF	1	3	12/15/2021 10:10:55 AM	ATHERIOT

# 5 – Manage Individual Document Batches



Logout

- [Inquiry](#)
- [Worklist](#)
- [Upload](#)
- [Batch Upload](#)
- [Batch Maintenance](#)
- [Query](#)
- [Query Builder](#)
- [Settings](#)

**Batch Documents**

Cancel
Import Batch
Reset Batch

Folder	Form	Pages	Document Status
Accounts Payable	Invoices	6	New

**Document Details**

Folder: Accounts Payable

Form: Invoices

New Folder:

New Form:

Vendor: 0897

Vendor Name: CAPITAL ONE WALMART

Project Number:

Requisition Number:

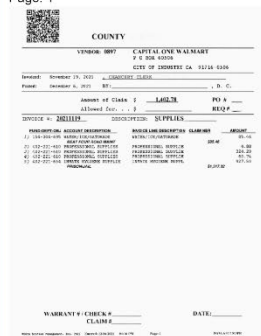
PO Number:

Save Changes

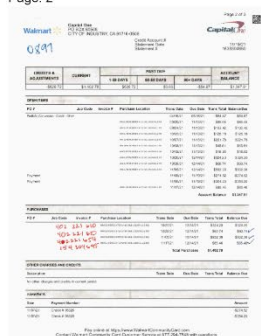
**Pages**

Delete Selected Pages
Split Document
Zoom In
Zoom Out


Page: 1




Page: 2



Page: 3



# Batch Upload Option with Index Input



Logout


- Inquiry
- Worklist
- Upload
- Batch Upload**
- Batch Maintenance
- Query
- Query Builder
- Settings

Folder:  Form:

<input type="checkbox"/>	Filename	Size	Type	Status	%
<input type="checkbox"/>	1 r-securus-1.pdf	193.1 KB	application/pdf		0%
<input type="checkbox"/>	2 r-securus-2.pdf	204 KB	application/pdf		0%
<input type="checkbox"/>	3 r-securus-3.pdf	279 KB	application/pdf		0%
<input type="checkbox"/>	4 r-state of ms.pdf	279.2 KB	application/pdf		0%
<input type="checkbox"/>	5 r-tn valley authority.pdf	217.8 KB	application/pdf		0%
<input type="checkbox"/>	6 r-us corrections.pdf	169.9 KB	application/pdf		0%

Selected 6 File(s), 1.3 MB

# Uploaded Documents Waiting for Index



**DSM**  
DATA SYSTEMS  
MANAGEMENT

Folder:  Form:  Status:

Find:  File:  From Date:  To Date:  Person:

From Fiscal Year:  To Fiscal Year:  Receipt Number:

From Receive Date:  To Receive Date:

From Post Date:  To Post Date:

From Receipt Amount:  To Receipt Amount:  Received From:

Receipt Format ID:

[Logout](#)

[Inquiry](#)

[Worklist](#)

[Upload](#)

[Batch Upload](#)

[Batch Maintenance](#)

[Query](#)


[Query Builder](#)

[Settings](#)

	Folder	Form	Details	Status	File Name	Added	Added By
	General Ledger	Receipts		Active	r-us corrections.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts		Active	r-tn valley authority.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts		Active	r-state of ms.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts		Active	r-securus-3.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts		Active	r-securus-2.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts		Active	r-securus-1.pdf	12/23/2021 05:45:44 PM	Al Theriot
	General Ledger	Receipts	<b>Fiscal Year:</b> 2021 <b>Receipt Number:</b> 32066 <b>Receive Date:</b> 05/12/2021 <b>Post Date:</b> 05/12/2021 <b>Receipt Amount:</b> \$11,458.57 <b>Received From:</b> SECURUS TECHNOLOGIES	Active	r-securus-3.pdf-0.PDF	12/23/2021 12:10:50 PM	Al Theriot
	General Ledger	Receipts	<b>Fiscal Year:</b> 2021 <b>Receipt Number:</b> 32118 <b>Receive Date:</b> 05/25/2021 <b>Post Date:</b> 05/25/2021 <b>Receipt Amount:</b> \$80.00 <b>Received From:</b> STATE OF MS - MDOC	Active	r-state of ms.pdf-0.PDF	12/23/2021 12:10:44 PM	Al Theriot

# Worklist Index Edit



Logout

Inquiry

Worklist

Upload

Batch Upload

Batch Maintenance

Query

Query Builder

Settings

Index Details | Document Log | Notes

Folder: Accounts Payable

Form: Invoices

Uploaded File: east-ms-electric-oct2021-beat3.PDF

**\*Changing the Folder and Form may result in data loss.**

New Folder:

New Form:

Inactive?:

Vendor: 2450

Vendor Name:   !

Project Number:

Requisition Number:

PO Number:


Invoice:

Invoice Description:

Invoice Amount:

Invoice Date:

Post Date:



COUNTY

---

**VENDOR: 2450**      **EAST MS. ELECTRIC POWER ASSN**  
 P O BOX 429  
 LOUISVILLE MS 39339

---

**Invoiced:**    October 22, 2021    CHANCERY CLERK BY: \_\_\_\_\_  
**Posted:**     November 2, 2021    \_\_\_\_\_, D. C.

---

Amount of Claim \$    39.89                      **PO #** \_\_\_\_\_  
 Allowed for. . . \$    \_\_\_\_\_                      **REQ #** \_\_\_\_\_

---


**INVOICE #:**    20211022BE3                      **DESCRIPTION:**    BEAT 3

---

FUND-DEPT-OBJ	ACCOUNT DESCRIPTION	INVOICE LINE DESCRIPTION	CLAIM NBR	AMOUNT
1)	153-303-510 UTILITIES	UTILITIES		39.89
	<i>BEAT THREE ROAD MAINT</i>			<i>\$39.89</i>

Cancel
Save Changes
Upload New File
E-mail
Help

# ADMINISTRATION – Manage Users













Logout

- Inquiry
- Worklist
- Upload
- Batch Upload
- Batch Maintenance
- Query
- Query Builder
- Settings


Users | Folders | Security Groups | Index Fields | System Settings

Search:  + Add

	Username	Name	Email	Password Expires	Disabled	Receives System Notific...	Public
 	ADMIN	Administrator		04/01/2022	false	false	false
 	ATHERIOT	Al Theriot	al@altheriot.com	03/14/2022	false	true	false
 	AWALKER	Annette Walker	awalker@datasysmgt.com	04/01/2022	false	false	false
 	BOARD	Board of Supervisors		04/01/2022	false	false	false
 	MJAYNES	Melinda Jaynes	mjaynes@datasysmgt.com	04/01/2022	false	false	false



# Control User Function



Users | Folders | Security Groups | Index Fields | System Settings

Updating User: ATHERIOT

User: ATHERIOT  
Name: Al Theriot  
Password:   
Email: al@altheriot.com  
Password Expires: 03/14/2022

Disabled?  
 Receive System Notifications?  
 Public?

**Warning, any documents that are available to the public user will be available on the internet.**

Menu	Has Access?
Inquiry	<input checked="" type="checkbox"/>
Worklist	<input checked="" type="checkbox"/>
Upload	<input checked="" type="checkbox"/>
Batch Upload	<input checked="" type="checkbox"/>
Query	<input checked="" type="checkbox"/>
Query Builder	<input checked="" type="checkbox"/>
Settings	<input checked="" type="checkbox"/>
Users	<input checked="" type="checkbox"/>
Folders	<input checked="" type="checkbox"/>
Security Groups	<input checked="" type="checkbox"/>
Index Fields	<input checked="" type="checkbox"/>
System Settings	<input checked="" type="checkbox"/>

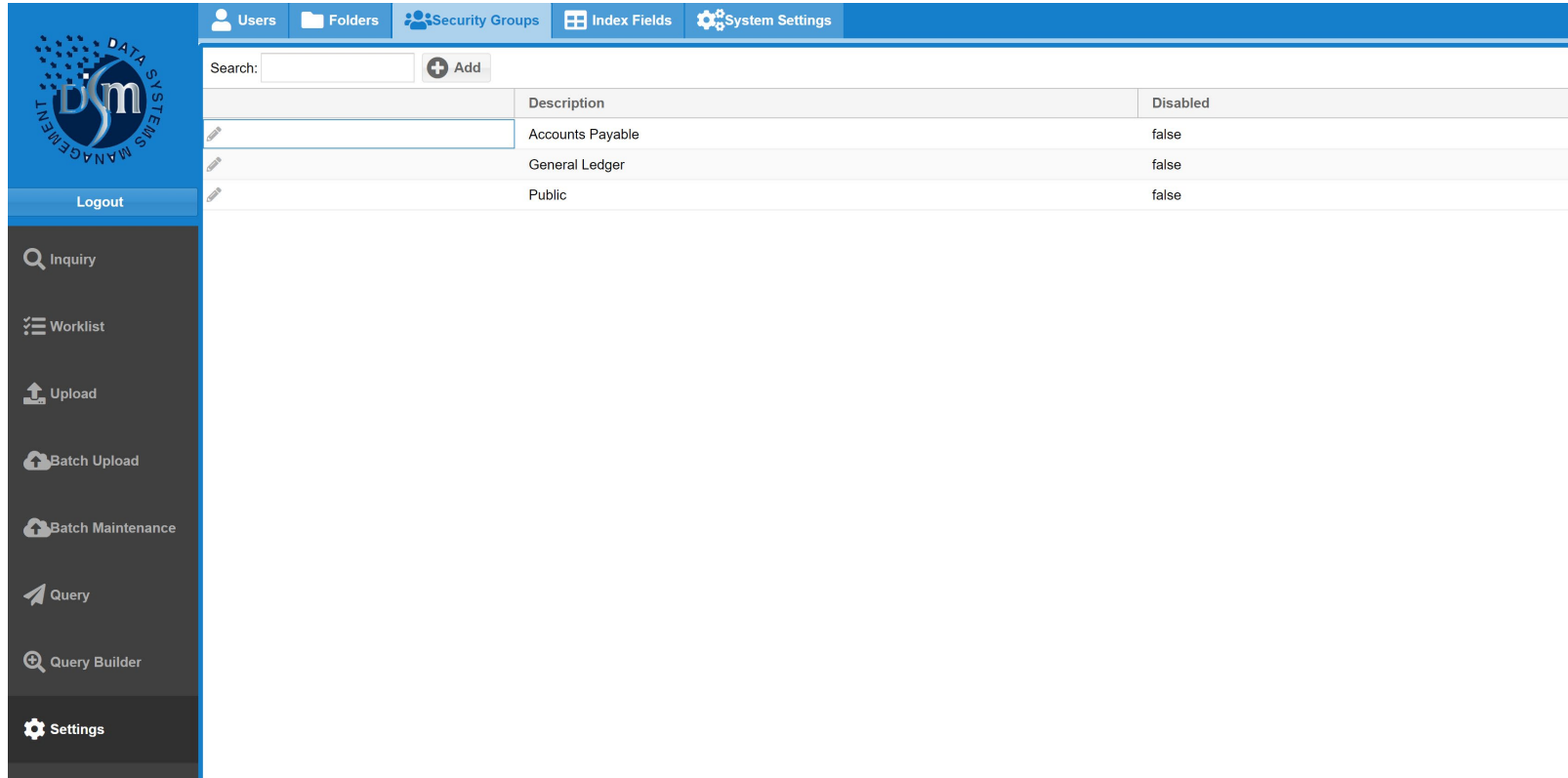
Security Group	Has Access
Accounts Payable	<input checked="" type="checkbox"/>
General Ledger	<input checked="" type="checkbox"/>

Logout

- Inquiry
- Worklist
- Upload
- Batch Upload
- Batch Maintenance
- Query
- Query Builder
- Settings

Cancel Save Help


# Control User Folder Access with Security Groups



The screenshot displays the DSM Data Systems Management interface. The top navigation bar includes tabs for Users, Folders, Security Groups (selected), Index Fields, and System Settings. The left sidebar contains a 'Logout' button and a menu with options: Inquiry, Worklist, Upload, Batch Upload, Batch Maintenance, Query, Query Builder, and Settings. The main content area features a search bar with an 'Add' button and a table of security groups.

	Description	Disabled
	Accounts Payable	false
	General Ledger	false
	Public	false

# Control Security Group Folder Access



Users | Folders | Security Groups | Index Fields | System Settings

Description:  Disabled?:

### Folder Access

Folder	Form	Has Access
Accounts Payable	Invoices	<input checked="" type="checkbox"/>
General Ledger	Receipts	<input type="checkbox"/>

### Query Access

Query	Has Access
Vendor List	<input checked="" type="checkbox"/>

# Folder Design – Accounts Payable

Users
Folders
Security Groups
Index Fields
System Settings

Description:  Disabled?:

### Forms

[+ Add](#)
[? Batch Import Help](#)

Description	File Required	Form Id	Form Id Type	Remove Cover Page	Disabled	
Invoices	<input checked="" type="checkbox"/>	APINVOICE	QR-Code	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">✎</a>

### Form Fields: Invoices

Field Type: 
[+ Add](#)
[Save](#)
[Batch Import Preview](#)

Field	Occurs	Batch Import Column	Searchable	Range Searchable	Required	Disabled	Grid Details	
Vendor (Vendor ID)	1	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
Vendor Name (Vendor Name)	1	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
Project Number (Project Number)	1	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
Requisition Number (Requisition Number)	1	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
PO Number (PO Number)	1	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
Invoice (Invoice)	1	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>
Invoice Description (Invoice Description)	1	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">✖</a>

[↶ Cancel](#)
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[Batch Maintenance](#)

[Query](#)

[Query Builder](#)

[Settings](#)

# Folder Design – General Ledger

Users
Folders
Security Groups
Index Fields
System Settings

Description:  Disabled?:

**Forms**

+ Add ? Batch Import Help

Description	File Required	Form Id	Form Id Type	Remove Cover Page	Disabled	
Receipts	<input checked="" type="checkbox"/>	GLRECEIPT	QR-Code	<input type="checkbox"/>	<input type="checkbox"/>	

**Form Fields: Receipts**

Field Type:  + Add Save Batch Import Preview

Field	Occurs	Batch Import Column	Searchable	Range Searchable	Required	Disabled	Grid Details	
Fiscal Year (Fiscal Year)	1	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Receipt Number (Receipt Number)	1	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Receive Date (Receive Date)	1	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Post Date (Post Date)	1	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Receipt Amount (Receipt Amount)	1	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Received From (Received From)	1	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Received For (Received For)	1	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Cancel Save Help

# ProntoDMS Folder Design

Users Folders Security Groups Index Fields System Settings

Description: MAIN FOLDER Disabled?:

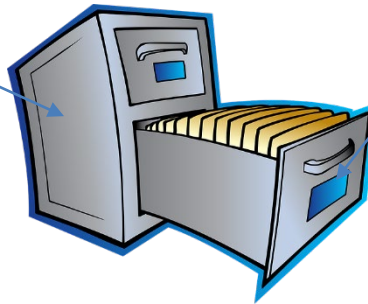
### Sub-Folders

+ Add

Description	File Required	Disabled	
Sub-Folder1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sub-Folder2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sub-Folder3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## Main Folder/Volume

- EMPLOYEE FILES
- VENDOR FILES
- PRODUCT FILES
- ASSETS



## Sub-Folder/File Drawer

- EMPLOYEE-Personal/Medical
- VENDOR-Contracts/Invoices
- PRODUCT-Product

# ProntoDMS TAB Design

Users Folders Security Groups Index Fields System Settings

+ Add ? Batch Import Help

Description	File Required	
Employee	<input checked="" type="checkbox"/>	
Medical	<input checked="" type="checkbox"/>	

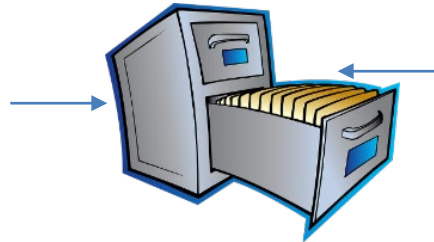
Sub-Folder Fields: Employee

Field Type:  + Add Save Batch Import Preview

Field	Occurs	Batch Import Column	Searchable	Range Searchable	Required	Grid Details	
Name (Full Name)	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Birth Date (Birth Date)	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Doc Date (Doc Date)	1	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Main Folder/Sub-Folder

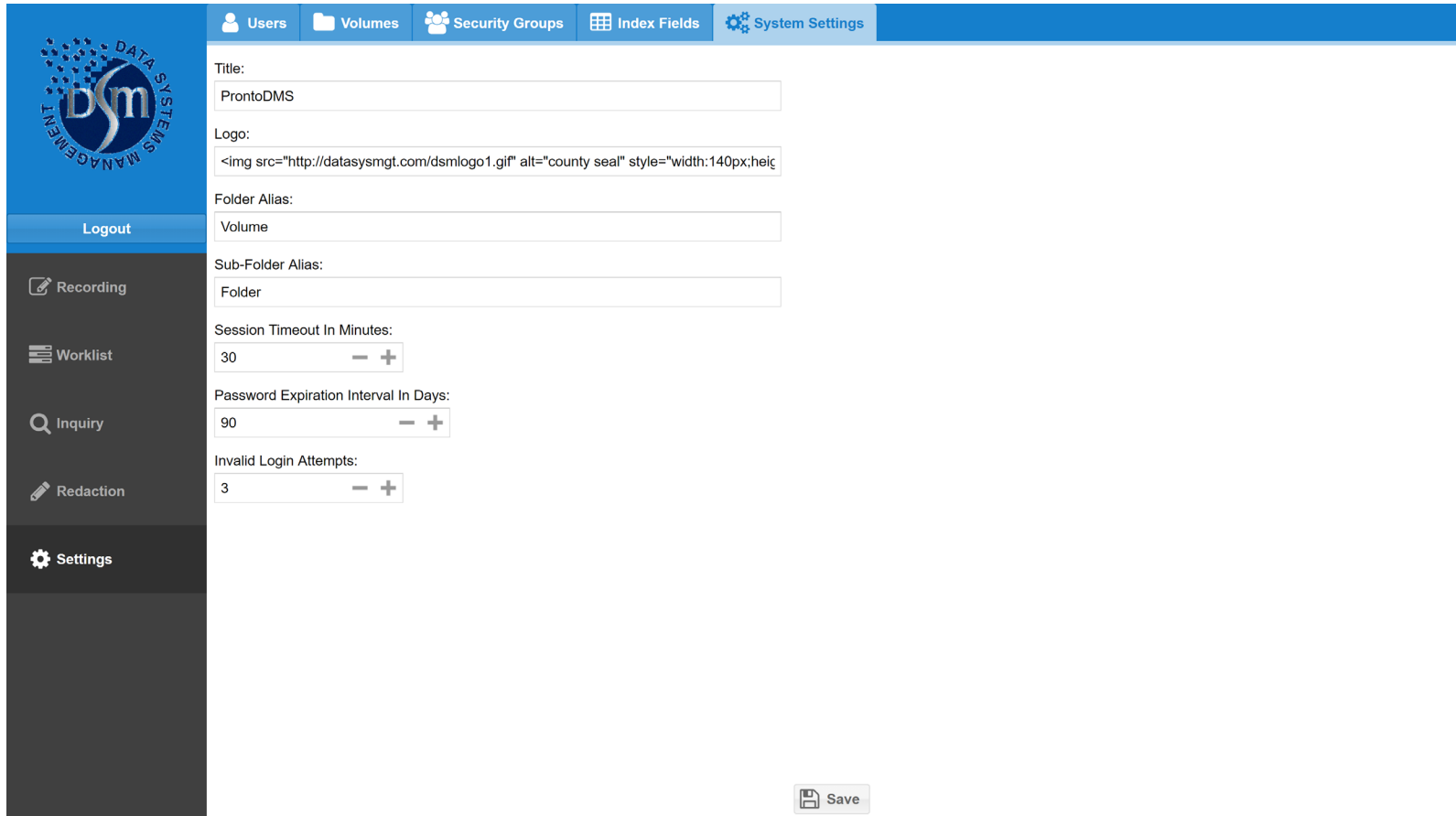
- PERSONNEL: Employee/Medical
- VENDOR: Contracts/Invoices
- PRODUCT: Product



## Folder Labels

- EMPLOYEE: Name-Birth Date-DocDate
- VENDOR: Name-DocType
- PRODUCT: Name-Description-Type

# Load **YOUR OWN** Logo via System Settings



The screenshot displays the 'System Settings' page in the Data Systems Management (DSM) application. The left sidebar contains navigation options: Recording, Worklist, Inquiry, Redaction, and Settings. The top navigation bar includes Users, Volumes, Security Groups, Index Fields, and System Settings. The main content area is titled 'System Settings' and contains the following configuration fields:

- Title:** ProntoDMS
- Logo:** ``
- Folder Alias:** Volume
- Sub-Folder Alias:** Folder
- Session Timeout In Minutes:** 30
- Password Expiration Interval In Days:** 90
- Invalid Login Attempts:** 3

A 'Save' button is located at the bottom right of the page.





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