



TROVALO

FILE IT. FIND IT.
DOCUMENT & RECORDS MANAGEMENT

Trovalo Document and Records Management User Manual

Installation | Setup | Daily Operation | Printing | Security

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This manual explains how customers install, activate, configure, and use Trovalo to manage physical documents and file folders. It is intended for administrators, records personnel, and authorized office users.



Register



Find



Circulate



Print

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Using this manual. Word users can use the Navigation pane to move between sections. The PDF edition can be searched with Ctrl+F.

1 Start Here

Trovalo is a Windows application for offices that keep physical paper files. It records the information needed to identify a document, assigns it to a physical folder, tracks the folder when it leaves storage, and provides printing tools for covers, lists, labels, stamps, and seals.

The Trovalo physical records workflow

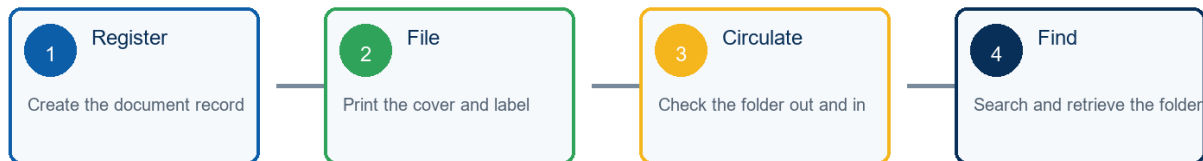


Figure 1 Trovalo supports the physical record from registration through retrieval

What Trovalo manages

- Document records, including origin, subject, dates, pages, actions, and formatted notes.
- Categories, folders, departments, employees, document types, and other master data.
- Complete physical folders that are checked out to employees and returned to storage.
- Upcoming action requirements with color-coded urgency.
- Folder labels, archive labels, document covers, lists, stamps, and corporate seals.
- User accounts, temporary passwords, roles, and authorized access.

Important distinction. A program user can sign in and operate Trovalo. An employee or borrower can receive a physical folder without being a program user.

2 Install Trovalo

Before installation

- Use a supported Windows 10 or Windows 11 computer.
- Obtain the installer only from the official Trovalo website or an authorized delivery link.
- Make sure the Windows user can install desktop software.
- Keep the customer registration information and license email available.

Installation steps

1. Download the Trovalo installation package and save it in the Downloads folder.
2. Close any older copy of Trovalo that is currently running.
3. Open the installer and approve the Windows confirmation prompts.
4. Accept the installation folder unless your administrator specifies another location.
5. Allow the installer to create the Trovalo desktop shortcut.
6. Finish installation and open Trovalo from the new shortcut.

Windows warning. Windows may warn that an Internet-downloaded installer is unsigned or from an unknown publisher. Confirm that the file came from the official Trovalo download before continuing.

Updating Trovalo

Close the program, install the newer approved release, and then open Trovalo from the desktop shortcut. An update normally replaces the application files while preserving customer data, but a current database backup should always be available before an upgrade.

3 Register and Activate the Product

The registration screen appears during first-time setup. A trial license normally remains valid for the number of days encoded in the issued trial Serial Number. A permanent license does not display a trial expiration date.

1. Enter the company or owner name and requested address information.
2. Copy the Computer ID shown on the registration screen.
3. Request a trial or commercial license and provide the exact registered owner name and Computer ID.
4. Enter the Serial Number and Software Unlock Key exactly as supplied.
5. Open and read the software conditions.
6. Select the agreement checkbox and submit the registration.

Registration field	Purpose
Registered owner	Identifies the customer to whom the license was issued.
Computer ID	Identifies the computer authorized for activation.
Serial Number	Identifies the issued trial or permanent license.
Software Unlock Key	Validates the registered owner and Serial Number.
Agreement	Confirms acceptance of the software conditions.

Computer replacement. Contact Trovalo support before transferring a license to another computer. Keep the original order and registration information available.

4 Create Users and Sign In

Create the first administrator

After first-time registration, Trovalo asks for the first user. This account administers security and creates additional users.

1. Enter a unique User Name.
2. Enter the person's Display Name.
3. Enter an alphanumeric password and confirm it.
4. Select Create User and then sign in.

Temporary passwords

An administrator can assign a temporary password to a new user or after a password reset. The user signs in with that temporary password and must then enter the new password twice. Passwords may contain letters, numbers, and symbols such as \$, @, &, and %.

Roles

Role	Typical access
Administrator	Full operation, user administration, roles, and security.
Manager	Records, circulation, employees, and master data.
Records Clerk	Document entry and folder check-out and check-in.
Viewer	Search and read-only record viewing.
Auditor	Read-only records and reports for review.

Account practice. Give each operator an individual user account. Do not share administrative passwords.

5 Understand the Main Menu

The main menu is the center of daily work. Available buttons depend on the user's role and the installed release.

Function	What it does
Log New Document	Creates a new document record and optionally prints its cover.
Search or View Log	Finds records and opens one record in read-only mode.
Edit Log	Finds and corrects an existing record when authorized.
Document List	Filters and prints lists with the selected criteria in the page heading.
Print Cover Page	Selects an existing record and prints its document cover.
Print Folder Labels	Selects multiple folders and prints the chosen Avery label form.
Archive Label	Selects records and prints archive labels using the selected layout.
File Circulation	Checks complete folders out and records their return.
Employees	Maintains people who may receive folders.

Function	What it does
Master Data	Maintains categories, folders, departments, and other standard values.
Import Utility	Validates and imports supported master and document data.
Users	Maintains accounts, roles, active status, and password resets.
Custom Settings	Selects company information, logos, fonts, colors, and print settings.
About or Version	Shows version, copyright, update month, and license status.
New Session	Opens another working session from an authorized functional screen.
Help	Opens help for the current screen or function.

Upcoming actions. The main menu also displays approaching action requirements. Select a row to open the related record in read-only mode.

6 Configure Company and Printing Settings

Custom Settings controls the customer identity and the default appearance of printed materials. Use the main program logo for general branding and select separate images when a stamp or seal requires a different graphic.

- Company name, owner information, address, and contact details.
- Main menu and general printing logo.
- Separate stamp or corporate-seal image.
- Fonts, font sizes, and color scheme.
- Document-cover paper size and orientation.
- Folder-label form and label typography.
- Saved defaults for stamps, seals, and print position.

Changing a logo. After selecting a replacement image, save the settings and reopen any print dialog that was already open. Use proportional image sizing so round logos remain round.

7 Maintain Employees and Master Data

Employees and borrowers

Employees are people who may receive physical folders. The Display Name is formed from First Name and Last Name. Department should be selected from the maintained department list when that field is used.

1. Open Employees from the main menu.
2. Enter the employee code, first name, last name, department, phone, email, and notes.
3. Leave Active selected while the person is eligible to receive folders.
4. Save and confirm that the employee appears in the list.

Rich-text notes support fonts, size, bold, italic, underline, text color, highlighting, bullets, indentation, and alignment. Lists continue to keep the Notes column compact; open the record to read the complete note.

Categories and folders

The file number combines Category Code and Folder Number in the form CategoryCode-FolderNumber. Both values are alphanumeric and may contain leading zeros, for example TP-001 or 16-501-A.

Master record	Example
Category	Code 16 Name Legal Documents
Folder	Category 16 Folder 501-A Name 2014 to 2022
File number	16-501-A
Department	Records, Legal, Finance, or another customer-defined value

Deletion and deactivation. Deactivate a value when its historical records must remain. Delete only when authorized and when no required record depends on it.

8 Register a Document

1. Select Log New Document.
2. Select the Category Code and Folder Number, then verify the displayed names.
3. Select or enter the document type.
4. Enter the originating person or organization and the document subject.
5. Enter the Document Date using MM/DD/YYYY.
6. Confirm the Recorded Date and number of pages.
7. Enter an action description and Action Required Date only when follow-up is required.
8. Enter formatted Notes when additional information is useful.
9. Save the record and choose whether to print the document cover.

Date formats

Date	Required display
Document Date	MM/DD/YYYY
Recorded Date	MM/DD/YYYY
Action Required Date	MM/DD/YYYY
Circulation dates	MM/DD/YYYY

Date	Required display
Sequence Date	YY-MM-DD, for example 57-06-10

Date entry. Date controls accept normal typed dates as well as calendar selection. In edit mode, the original Document Date is protected unless a correction is specifically authorized.

9 Search View and Edit Records

Search lists provide criteria for available fields. Most limited-choice fields use selection lists that filter as the user types. Free-text fields such as Subject, Action, and Notes remain text searches.

1. Open Search, View Log, Edit Log, Print Cover, or another list-based function.
2. Enter up to the needed selection criteria in the controls below the title.
3. Select Search to display matching records.
4. Select one row and use View Selected or double-click to inspect it.
5. Use Edit Selected only when changes are authorized.
 - Folder Name appears after Folder Number where folder identification is needed.
 - Checked-out folders display their status and the employee who received them.
 - Records unavailable for editing cannot be selected from an edit operation.
 - Multiple selection is available only for operations that can process several records, such as labels and lists.
 - The view screen may display the Document Date; edit mode protects that date from routine changes.

10 Monitor Action Requirements

Upcoming Action Requirements appear on the main menu. The background color shows how close the action is to its due date.

Days remaining	Display
30 to 20 days	Green background
19 to 11 days	Yellow background
10 to 0 days	Light red background with readable contrasting text
Past due	Review immediately according to office procedure

1. Review the Action Requirements list when the main menu opens.
2. Select the required item.
3. Open the record in read-only mode to review the action and document details.
4. Follow the office procedure for completing or updating the action.

11 Check Folders Out and In

Circulation records the movement of an entire physical folder. Only one folder entry should appear for a file number even when the folder contains many documents.

Folder circulation status

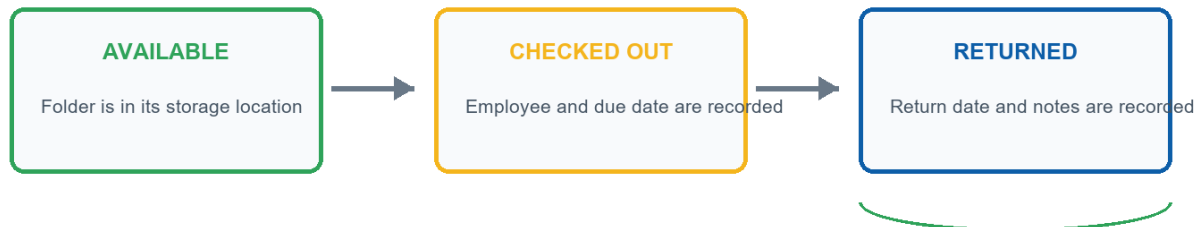


Figure 2 A returned folder becomes available for circulation again

Check out a folder

1. Open File Circulation and search by category, folder number, file number, or folder name.
2. Select the folder. Trovalo displays the Category Code, Folder Number, File Number, and Folder Name.
3. Select the employee receiving the folder.
4. Confirm the logged-in user who is issuing the folder.
5. Enter the pickup date and an expected return date when one is appropriate.
6. Enter the purpose and circulation notes when needed.
7. Select Check Out. The folder moves to the Currently Out list.

Check in a folder

1. Select the folder from Currently Out.
2. Confirm the logged-in user receiving the folder back.
3. Enter the actual returned date.
4. Enter return notes when necessary.
5. Select Check In. The folder becomes available and remains in circulation history.

Date accuracy. Record the actual pickup and returned dates. Trovalo does not require an hour because delayed data entry could make a recorded time misleading.

12 Print Covers Lists and Labels

Print preview

Review every print preview before sending a job to the printer. Confirm the selected printer, paper size, orientation, margins, scaling, and selected records. A correct preview does not override an incorrect printer-driver paper setting.

Document covers

- Print immediately after saving a document or select an existing document later.

- The cover displays the selected record, including its Notes field.
- The Sequence Date prints as YY-MM-DD.
- Other dates print as MM/DD/YYYY.

Document lists

Apply criteria for the needed columns, run the search, and review the list. Printed pages show Document List and the applied selection criteria in the page header at the same readable size.

Folder labels

Select one or more folders, select the Avery form, choose the label font and size when offered, preview the full sheet, and print on the matching label stock.

Avery 8160 measurement	Value
Rows and columns	10 rows by 3 columns
Top margin	0.44 inch after the 0.06 inch upward adjustment
Left starting margin	0.10 inch
Label size	2.625 inches wide by 1 inch high
Horizontal gap	0.15 inch
Vertical gap	0 inch

Logo proportions. Use a proportional image box so the logo is never stretched. The label design uses a compact logo area and wider top and bottom text lines.

Archive labels

Archive Label uses information from the document cover. Select multiple records when the chosen operation supports it, choose the label size, and verify the preview before printing.

13 Prepare Stamps and Seals

Trovalo can prepare Notary Public, certification, tax-document, and corporate seals. The user can enter the wording required for the selected stamp, choose the stamp color, position it graphically, rotate it, and preview it before printing.

Stamp or seal	Customer-controlled information
Notary Public	Notary name, state, commission expiration date, wording, size, color, position, and rotation.

Stamp or seal	Customer-controlled information
Certification	Custom certificate title, certification statement, signer name, signature area, date, color, position, and rotation.
Tax Document	All wording and fill-in fields displayed in the tax-stamp dialog.
Corporate Seal	Corporate name, logo, organization type, year, color, position, and rotation.

- Notarial and certification dates use MM/DD/YYYY.
- Blank input fields remain blank on the stamp; old values must not reappear.
- The selected color applies to all elements of the stamp.
- The corporate logo remains proportional and fully visible within its center circle.
- Organization wording may include Incorporated, Organized, Established, Founded, or another supported selection.

Legal responsibility. The customer must confirm that every stamp, seal, certification, and notarial format complies with the laws and professional requirements governing its use.

14 Import and Archive Records

Import Utility

Import customer data only from a validated template. Import master data before records that depend on it.

1. Select the import table or object.
2. Create or download its current CSV template.
3. Enter data without changing the template column names.
4. Browse to the completed CSV file.
5. Validate and correct every reported problem.
6. Review the preview and import the validated data.
7. Confirm the imported totals and inspect sample records.

Recommended sequence. Import Categories, Departments and other master values first; then Folders and Employees; then Documents and dependent records.

Archive instead of delete

Archiving removes an inactive document from normal active work while retaining its history. Use Show Archived to locate an archived record and Restore when authorized. Delete only under the customer's approved record-retention policy.

15 Protect and Back Up Data

The Trovalo database may contain confidential business, employee, financial, legal, and personal information. The customer is responsible for access control, database protection, backups, and recovery testing.

Frequency	Recommended practice
Daily	Create a database backup after normal business activity.
Weekly	Copy a recent backup to encrypted external or approved cloud storage.
Before import	Create a manual backup before a large data import.
Before upgrade	Create and verify a backup before installing a new release.
Periodically	Test restoration on an authorized non-production system.

- Protect Windows and SQL Server with strong administrator credentials.
- Limit Trovalo roles to the functions each user needs.
- Deactivate accounts when personnel leave or no longer require access.
- Protect backup files from unauthorized access and ransomware.
- Do not email screenshots containing confidential records unless properly secured.

16 Troubleshooting

Problem	What to check
The desktop shortcut opens an older version	Uninstall the obsolete copy or correct the shortcut target, then reinstall the current approved package.
The Help page is blank	Confirm that the published Documentation folder and current manual files were included in the installer.
Login is rejected	Verify the user name, temporary or permanent password, active status, and assigned roles. Ask an administrator to reset the password if needed.
A new user is not asked to change the password	Confirm that the administrator assigned a temporary password and that the password-change-required flag was saved.
A search screen does not respond	Close the screen, reopen it, and confirm the application is connected to its database. Record any displayed error.
The selected logo does not change	Save Custom Settings and reopen the affected print dialog. Confirm that Browse is enabled and that the selected image is accessible.

Problem	What to check
A label preview is misaligned	Confirm the Avery form, paper size, printer scaling, orientation, margins, and printer-driver settings.
The preview contains data but paper prints blank	Select the physical printer in the print dialog and verify the printer driver, page range, paper source, and print permissions.
Dates appear in the wrong order	Standard dates use MM/DD/YYYY. Sequence Date uses YY-MM-DD.
The wrong employee appears in circulation	Confirm the selected folder, receiving employee, and currently logged-in user's Display Name before completing the transaction.
SQL Server cannot be reached	Verify the configured SQL Server instance, service status, network access, and database connection settings.

When contacting support. Provide the Trovalo version, Windows version, exact error message, what the user was doing, and a screenshot that does not expose unnecessary confidential information.

17 Operator Checklist

- Sign in with your own user account.
- Verify the category and folder before saving a document.
- Use MM/DD/YYYY for normal dates and YY-MM-DD for Sequence Date.
- Enter an Action Required Date only when follow-up is actually required.
- Review the print preview and printer settings before every print job.
- Check out the complete folder, not one document inside it.
- Record actual pickup and return dates accurately.
- Archive records under the office retention policy instead of deleting history.
- Report incorrect data, security concerns, or backup failures promptly.
- Sign out or close Trovalo when leaving an unattended workstation.

18 Glossary

Term	Meaning
Action Required Date	The optional follow-up due date associated with a document.
Archive	A status that removes a record from normal active work while keeping its history.
Category Code	The first alphanumeric part of the file number.
Computer ID	The identifier used when issuing a license for a specific computer.

Term	Meaning
Date Sequence	The chronological sequence value displayed as YY-MM-DD.
Display Name	The user's or employee's readable name shown in transactions and lists.
Document Date	The date printed on or associated with the original document.
Employee or Borrower	A person who may receive a physical folder, whether or not that person can sign in.
File Number	Category Code and Folder Number combined as CategoryCode-FolderNumber.
Folder Number	The second alphanumeric part of the file number; leading zeros are preserved.
Master Data	Standard values used by transactions, such as categories, folders, departments, and employees.
Originating Entity	The person, company, office, court, or organization that created or sent a document.
Recorded Date	The date the document record was entered or received by the filing operation.
Record ID	The unique database identifier for a document record.
Role	A named set of permissions assigned to a program user.
Serial Number	The identifier for an issued trial or permanent product license.
Software Unlock Key	The code that validates the registered owner and Serial Number.
Temporary Password	An administrator-issued password that the user must replace at the next login.