FileSurf 7.5

Administrator Utility

Last Revised 06/02/03

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CHAPTER 1

Introduction

What you will learn in this chapter:

- Overview of the FileSurf Administrator Program
- Overview of the key parameters of FileSurf
- How to contact MDY Advanced Technologies, Inc. for additional guidance or instructions

Welcome

Welcome to the FileSurf Administrator Manual. This manual is designed to provide information about the parameter settings used to configure and administer the FileSurf main application. Separate tools are provided to administer the FileSurf Web application.

FileSurf is a very flexible records management system that can easily be configured to meet the needs of your organization. The parameter settings are used to configure FileSurf and control the way FileSurf performs. Certain configurations settings must be made only under the direction of the MDY Help Desk staff and they are clearly indicated in this manual.

FileSurf operates in two modes: Category/Folder Hierarchy mode (typically employed by corporate organizations) and the Client/Matter/Type of Law/Folder mode (employed by most law firms or legal departments of major organizations). You can select to turn certain FileSurf features on or off and present the end users with only the functionality they need to accomplish their tasks. You can customize the terminology used to label the FileSurf forms, data fields, labels and reports.

This Administrator Manual will guide you through system administration tasks and how to configure FileSurf to suit the needs of your organization and operate in the most efficient manner.

Assumptions

The information in this manual is written for FileSurf system administrators who will be responsible for configuring, maintaining and fine-tuning FileSurf. It is assumed that you have successfully completed the FileSurf Administrator's course and have a working knowledge of FileSurf functions and features.

FileSurf Administrator Program

After logging in to the Administrator Program, the ***Administrator Screen***, depicted in Figure 1-1 is displayed. This is the home-base from which all aspects of the system are available and where you exit from the system.

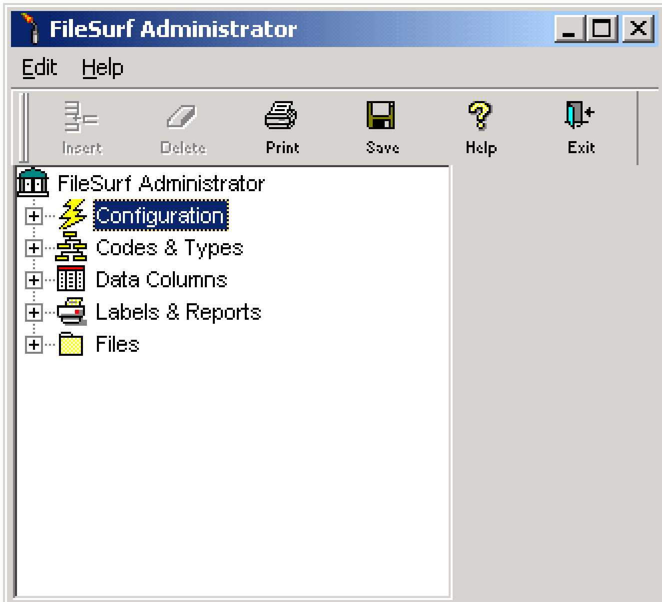

Figure 1-1 Administrator Screen

The ***Administration Screen*** provides access to the following modules:

MODULE	DESCRIPTION
Configuration	Provides accesses to system parameter configuration screens where you select the settings appropriate for the needs of your organization and where you may re-title the names of Forms displayed in the main program
Codes and Types	Allows you to define system codes, create and maintain lists of allowed data for certain data fields
Data Columns	Allows you to re-title the labels of the data fields displayed on the FileSurf forms, add custom data fields and control the protection of the database columns (read, write and custom)
Labels and Reports	Allows you to control access to the various pre-defined reports and labels available in FileSurf. You may modify the names of the reports and labels and determine which reports and labels will be displayed in the main program.
Files	Allows you to create, view, modify and designate the types of files that will be allowed, prohibited or defaulted to the file Categories or Matter Types of Law

Contacting MDY Advanced Technologies, Inc.

MDY Advanced Technologies, Inc. is a prime resource for organizations that must meet the challenges faced by today's technology-driven business world. It offers a unique mixture of project management, software development and network integration skills, together with knowledge, document and records management solutions.

CORPORATE HEADQUARTERS:	
Address:	21-00 Route 208 South Fair Lawn, New Jersey 07410
Telephone:	201-797-6676
Fax:	201-797-6852
World Wide Web:	www.mdy.com
Office Hours:	Monday to Friday 9:00 am to 5:00 pm, Eastern Standard Time
Help Desk:	201-797-6676, option 1
Sales:	201-797-6676, option 0

MDY's professional sales staff is ready to answer your sales questions Monday through Friday, from 9:00 a.m. to 5:00 p.m., Eastern Standard Time.

Visit our web site for up to date addresses and phone numbers of the sales offices located throughout the United States.

Contact your sales representative for information about the latest MDY Advanced Technologies, Inc. products, software subscription plans, upgrade options, prices and more.

CHAPTER 2

Parameter Configuration

2

What you will learn in this chapter:

- Basic understanding of the used to configure the modes and operations of FileSurf
- How to customize the terminology used for FileSurf forms, objects, and icons
- How configure each of the Client, Matter, Folder, Box and Room numbering schemes
- How to control which tabs are displayed on the various Forms

General

In this chapter, you will learn how to configure the modes and operations of FileSurf. You will learn how to customize the terminology (labels) used for FileSurf forms, objects and icons. You will also learn how to: turn on or off certain features that may be available on the various FileSurf forms; how to configure each of the Client, Matter, Folder, Room and Box numbering schemes; and how to control the tabs displayed on the various forms.

All Parameters

The ***All Parameters*** configuration screen, depicted in Figure 2-1, is used to display the default and current settings of the various FileSurf parameters. This screen is used for display only. You should **not** make modifications to any of the settings from this screen unless you are instructed to do so by the Help Desk staff at MDY Advanced Technologies, Inc. The Help Desk staff will likely to ask you to read parameter settings from this Form during troubleshooting operations.

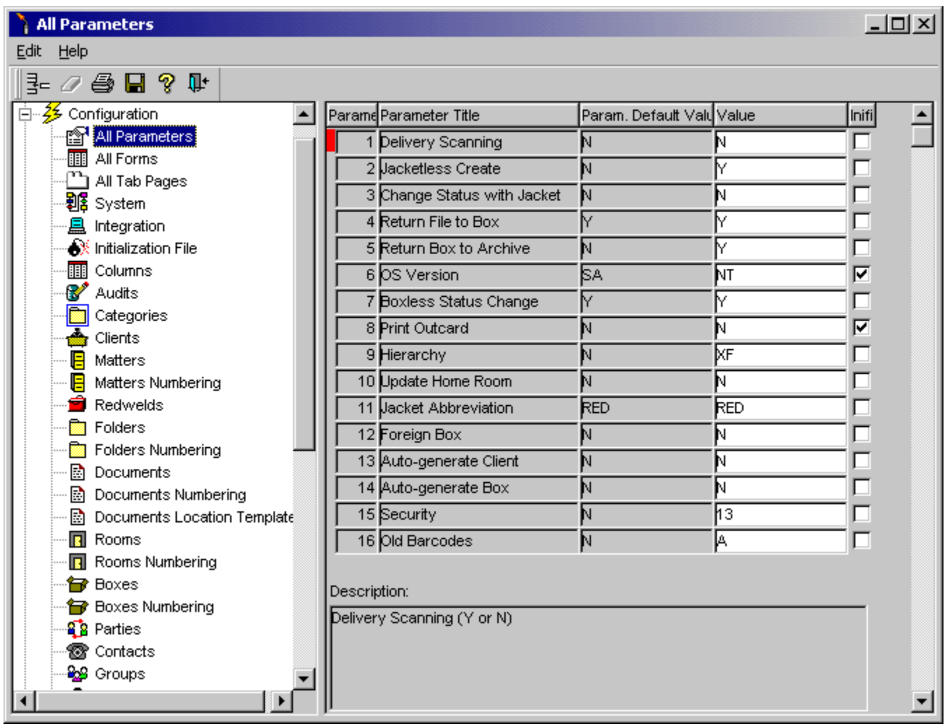

Figure 2-1 All Parameters Configuration Screen

All Parameters

The ***All Parameters*** configuration screen is composed of five parameters. They are:

DATA COLUMN	DESCRIPTION
Parameter	Identifies the ID number of each of the approximately 400 parameters used to configure FileSurf. You may click on the column heading to sort the data by ID number making it easier for you to find a particular parameter. This data is read-only and cannot be modified.
Parameter Title	Identifies the various parameters by title. This data is read-only and cannot be modified. A description of the parameter and optional value settings are displayed in the ***Description*** window near the bottom of the form.
Param. Default Value	Identifies the out-of-the-box parameter settings, where applicable. This data is also read-only and cannot be modified.
Value	Identifies the current value of the parameter settings. You may change the parameter settings in this column, but you should only do so under the guidance of the MDY Help Desk staff.
INI	List of check boxes. A check in one of these boxes configures FileSurf to obtain the value for this parameter from the FileSurf INI file. You should not add or remove checks from these boxes unless instructed to do so by the MDY Help Desk staff.

Note: *FileSurf provides alternate options for changing the parameters that are displayed on this screen. The alternate editing options may be easier to use as they are displayed in a more logical manner and the parameter options are easier to discern. For example, to change Parameter 57,* ***Only Show Active Employees,*** *you should select the User icon in the FileSurf Administrator menu tree and place a check in the Only Show Active check box.*

Procedures

If you are instructed by the MDY Help Desk staff to enter or change parameters on this screen, use the following procedures:

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To add a new parameter, click on the ***Insert*** icon. A new, blank record will be added to the list. Fill in the data fields as instructed
- To print the screen, click the ***Print*** icon
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

All Forms

The ***All Forms*** configuration screen, depicted in Figure 2-2, has multiple purposes. It is used to indicate the following parameter settings:

- Custom names for the title of the FileSurf forms
- Allow or disallow custom data fields to be added to a particular form
- Allow or disallow objects created on a specific Form to be linked to objects created on other forms
- Specify whether user activity associated with a particular Form is captured in the Audit logs

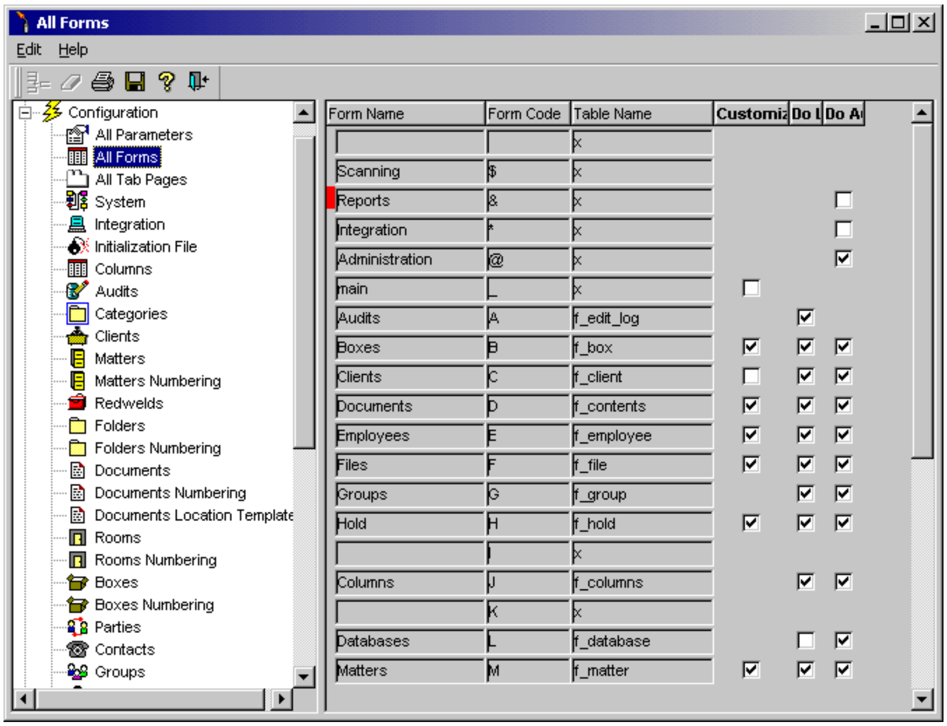

Figure 2-2 All Forms Configuration Screen

All Forms Parameters

The ***All Forms*** configuration screen is composed of six parameters. They are:

DATA COLUMN	DESCRIPTION
Form Name	Identifies default name of each FileSurf form. This data is read-only. You may click on the column to sort the names in alphabetical order making it easier for you to find a particular form.
Form Code	Identifies the internal codes used by FileSurf for each form. This data is read-only.
Table Name	Identifies the name of the database table that is associated with a form. This data is read-only.
Customize	List of check boxes. A check in one of these boxes configures FileSurf to allow custom data fields to be added to the specified form.

DATA COLUMN	DESCRIPTION
Do Link	List of check boxes. A check in one of these boxes configures FileSurf to allow objects that are created via the specified Form to be linked to other FileSurf objects.
Do Audit	List of check boxes. A check in one of these boxes configures FileSurf to capture user activity associated with the specified Form in the audit logs. This is a secondary method for specifying these settings. The preferred method is to use the ***Audit*** function in the main program.

Procedures

- To control the insertion of custom fields on a form, select the Form and add or remove a check in the ***Customize*** check box
- To control the linking of objects created by a form, select the Form and add or remove a check in the ***Link*** check box
- To control the auditing of user activity associated with a form, select the Form and add or remove a check in the ***Audit*** check box
- To add a new Form (when instructed), click the ***Insert*** icon. A new, blank record will be added to the list. Fill in the data fields as instructed
- To delete a Form (when instructed), click the ***Delete*** icon while the cursor is in either field of the record to be deleted. Select ***Yes*** to confirm your deletion or ***No*** to cancel the deletion
- To print the list, click the ***Print*** icon
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

All Tab Pages

The ***All Tab Pages*** configuration screen, depicted in Figure 2-4, is used to control the display of Tabs on each of the main application Forms.

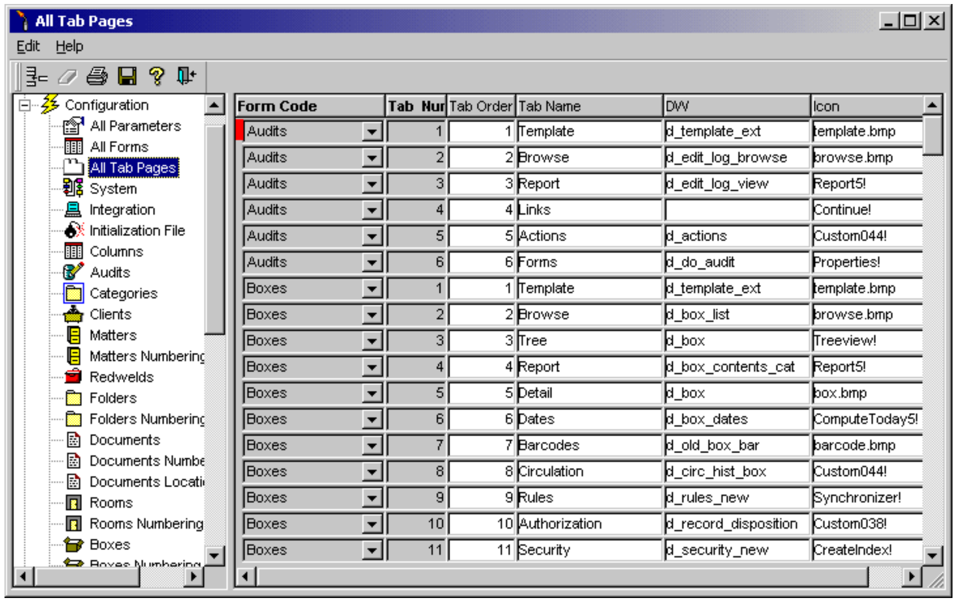

Figure 2-3 All Tab Pages

Parameters

The ***All Tab Pages*** configuration screen is composed of six parameters. They are:

DATA FIELD	DESCRIPTION
Form Code	System-wide term used to identify form. This is a read-only field and cannot be modified.
Tab Number	Number used to identify tab. This is a read-only field and cannot be modified.
Tab Order	Order in which tabs appear on Form. 0 = do not display this tab 1 = far left position highest number = far right position
Tab Name	Term displayed on tab
DW	Code associated with data window
Icon	Code associated with .bmp or custom .jpg displayed on tab

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the restarting the main application
- To print the screen, click the ***Print*** icon

- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

System

The ***System*** configuration screen, depicted in Figure 2-4, is used to enter system-wide parameters.

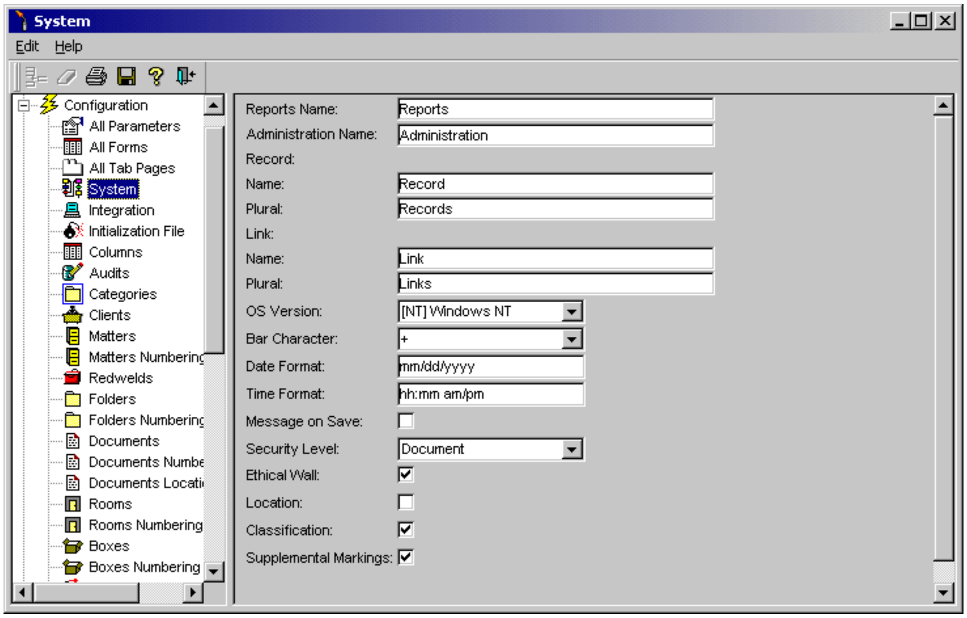

Figure 2-4 System Configuration Screen

System Parameters

The ***System*** configuration screen is composed of eighteen parameters. They are:

DATA FIELD	DESCRIPTION
Reports Name	Term used system-wide for reports
Administration Name	Term used throughout the system when referring to Administration
Record Name	Term used system-wide for Record
Plural Name	Plural term used system-wide for Records
Link Name	System-wide term used for Link
Plural Name	Plural term used system-wide for Links

DATA FIELD	DESCRIPTION
OS Version	Used to specify the operating system and mode to be used by the workstations that are connected to FileSurf. The options are: [SA] Stand-Alone Mode [WG] Windows WorkGroup [NT] Windows 95, 98, NT or 2000 [WIN] Windows 3.X [95] Windows 95 only [BV] Banyan Vines
Bar Character	Used to specify the character used to identify a barcode during manual data entry. The default character is the plus sign (+).
Date Format	Used to specify the format of the date data fields. The default format is mm/dd/yyyy.
Time Format	Used to specify the format of the time data fields. The default format is hh:mm am/pm.
Message on Save	When check box is marked, a message is displayed on save in the main application
Security Level	Used to specify the level of access control that will be enforced by FileSurf. Choose from: Document File Matter Category Client
Ethical Wall	When marked, indicates Ethical Wall security is being used (user access will be controlled at the Category or Matter Type of Law level)
Location	When marked, indicates Location security is being used (user access will be restricted to files and records that are created at the user's office/geographic location)
Classification	When marked, indicates Classification security is being used (security clearance levels to assigned to User accounts controls User access to FileSurf objects; may be combined with Ethical Wall security and Supplemental Markings).
Supplemental Markings	When marked, indicates Supplemental Markings is being used (when used with Classification, adds a third level of security to FileSurf objects).

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Integration

The ***Integration*** configuration screen, depicted in Figure 2-5, is used to allow FileSurf to act as a DDE server for integrated products such as document management, imaging and work flow systems. You should not make any changes on this screen unless directed to do so by the MDY Help Desk staff.

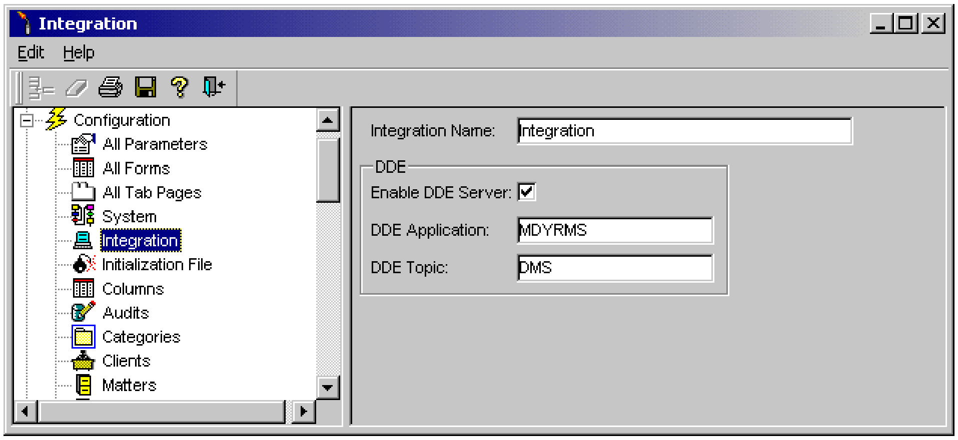

Figure 2-5 Integration Configuration Screen

Integration Parameters

The ***Integration*** configuration screen is composed of four parameters. They are:

DATA FIELD	DESCRIPTION
Integration Name	Used to identify the type of integration with FileSurf.
Enable DDE Server	Used to configure FileSurf to be used as a DDE server.
DDE Application	Used to name FileSurf as the DDE application.
DDE Topic	Used to specify the type of application that is being integrated with FileSurf

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Initialization File

The ***Initialization*** configuration screen, depicted in Figure 2-6, is used to display the parameter settings specified in the FileSurf initialization (INI) file. This screen is used for information only. You should **not** make modifications to any of the settings from this screen unless you are instructed to do so by the Help Desk staff at MDY Advanced Technologies, Inc. The Help Desk staff will likely to ask you to read parameter settings from this screen during troubleshooting operations.

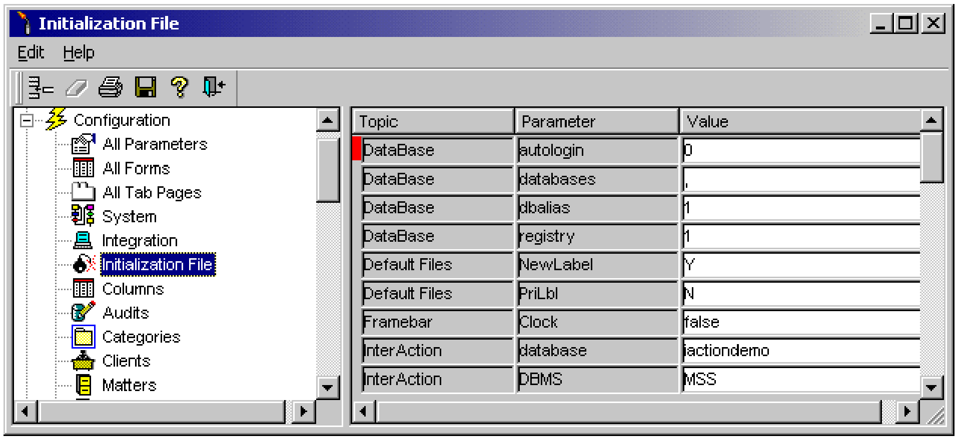

Figure 2-6 Initialization File Configuration Screen

Initialization File Parameters

The ***Initialization File*** configuration screen is composed of three parameters. They are:

DATA FIELD	DESCRIPTION
Topic	The ***Topic*** data column identifies the section in the FileSurf initialization to which the data applies. This data is read-only and cannot be modified. You may click on the column to sort the data in alphabetical order making it easier for you to find a particular topic.
Parameter	The ***Parameter*** column identifies the names of the various parameters. This data is read-only and cannot be modified. You may click on the column to sort the data in alphabetical order making it easier for you to find a particular parameter.
Value	The ***Value*** column identifies the parameter settings from the INI file, where applicable. You may change the parameter settings in this column, but you should only do so under the guidance of the MDY Help Desk staff.

Procedures

If you are instructed by the MDY Help Desk staff to enter or change parameters on this screen, use the following procedures:

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To add a new parameter, click on the ***Insert*** icon. A new, blank record will be added to the list. Fill in the data fields as instructed
- To print the screen, click the ***Print*** icon
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Columns

The ***Columns*** configuration screen, depicted in Figure 2-7, is used to specify the terminology used for this Form in the main program.

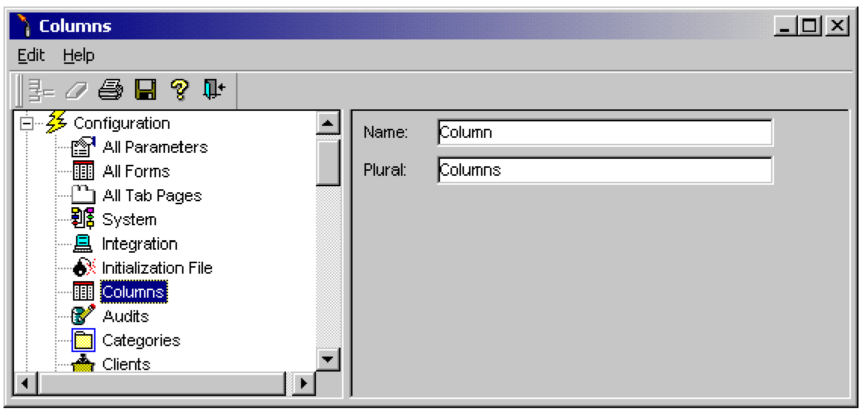

Figure 2-7 Columns Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Audits

The ***Audits*** configuration screen, depicted in Figure 2-8, is used to specify the terminology used for this Form in the main program.

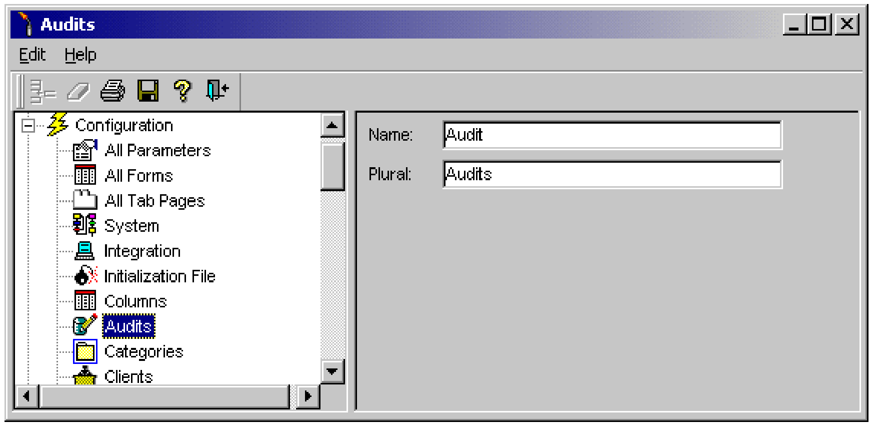

Figure 2-8 Audit Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Categories

The ***Categories*** configuration screen, depicted in Figure 2-9, is used to configure the parameters that control the display of the Categories Form in the main program.

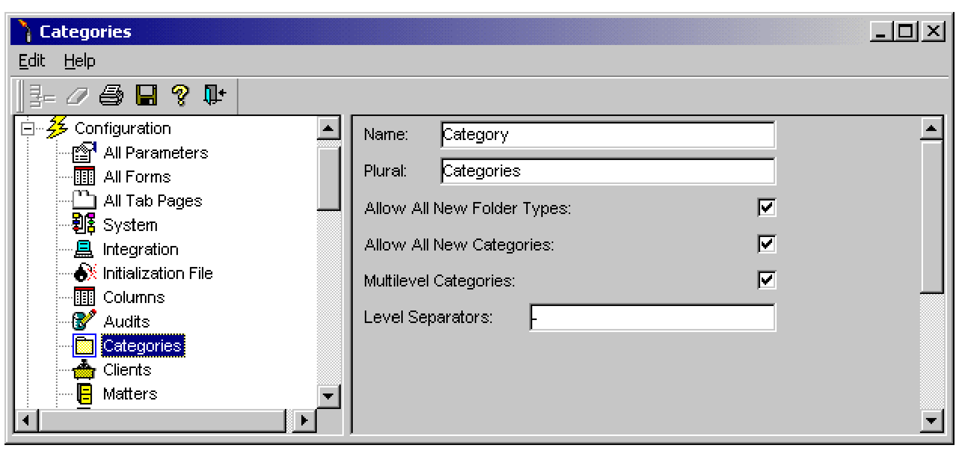

Figure 2-9 Categories Configuration Screen

Categories Parameters

The ***Categories*** configuration screen consists of six parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Category Form. In Legal installations that use the Client/Matter hierarchy, the Category Form is usually renamed the Type of Law Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Category Form. In Legal installations that use the Client/Matter hierarchy, the plural name is usually Types of Law.
Allow All New File Types	The ***Allow All New File Types*** check box, if checked, configures FileSurf to mark all File Types as "Allowed" for newly created Categories.
Allow All New Categories	The ***Allow All New Categories*** check box if checked, configures FileSurf to mark all File Types as "Allowed" for newly created Category.
Multilevel Categories	The ***Multilevel Categories*** check box, if checked, configures FileSurf to allow the creation of Categories in a multilevel hierarchy.
Level Separators	The ***Level Separators*** parameter is used to specify the character that will be used to separate the Category or Type of Law hierarchical levels.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Clients

The ***Clients*** configuration screen, depicted in Figure 2-10, is used to configure the parameters that control the display of the Client Form in the main program.

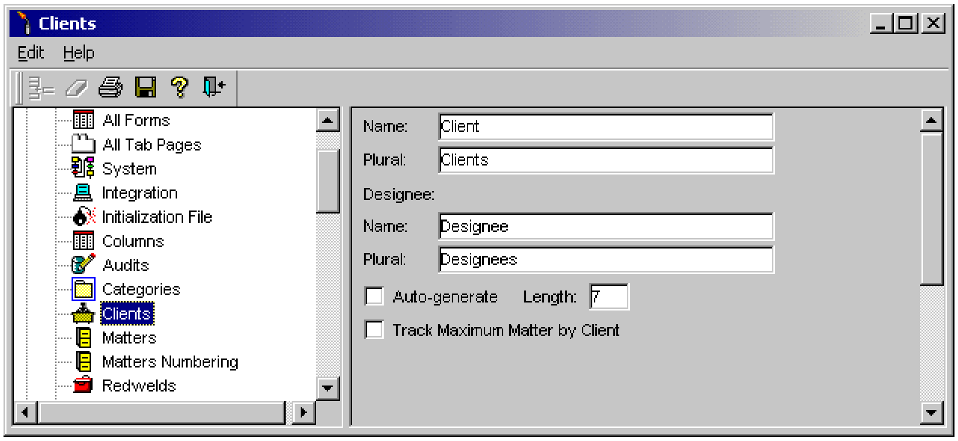

Figure 2-10 Clients Configuration Screen

Parameters

The ***Clients*** configuration screen consists of seven parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Client Form. In Corporate installations that use the Client/Matter hierarchy, the Client Form is usually renamed Division or Department.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Client Form.
Designee Name	The ***Designee Name*** parameter is used to enter a custom name for the label of the Designee data field.
Designee Plural	The ***Designee Plural*** parameter is used to enter the plural version of the custom name for the Designee data field.
Auto-Generate	The ***Auto-Generate*** check box, when checked, configures FileSurf to assign a computer-generated value in the Client Number data field.
Length	The ***Length*** check box is used to specify the size of the Client Number data field, when using Auto-Generate.
Track Maximum Matter by Client	The ***Track Maximum Matter By Client*** check box is used in conjunction with Auto-Generate. When checked, it configures FileSurf to look at the Client table to find the next available Matter number.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the configuration screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Matters

The ***Matters*** configuration screen, depicted in Figure 2-11, is used to configure the parameters that control the display of the Matters Form in the main program.

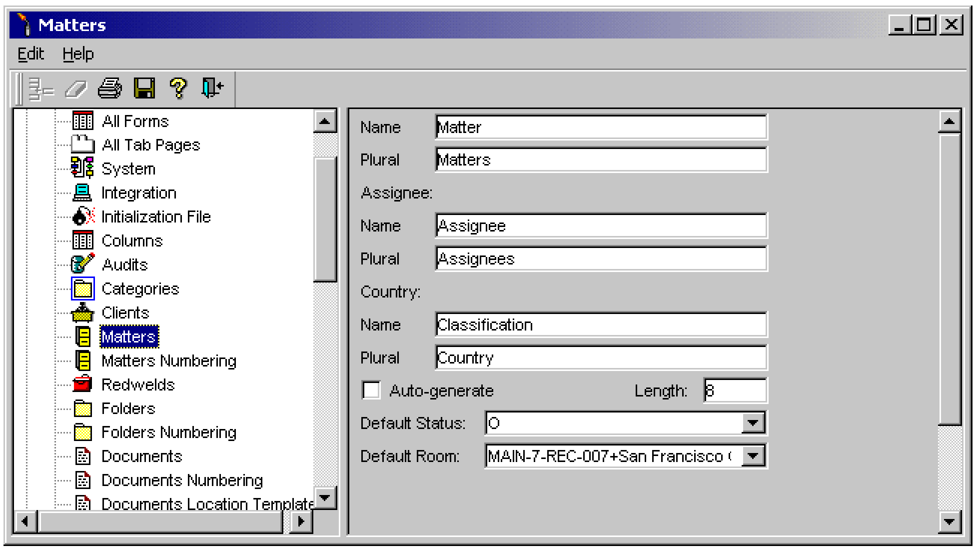

Figure 2-11 Matters Configuration Screen

Matters Parameters

The ***Matters*** configuration screen consists of ten parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Matter Form. In Corporate installations that use the Client/Matter hierarchy, the Matter Form is often renamed Project.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Matter Form.
Assignee Name	The ***Assignee Name*** parameter is used to enter a custom name for the label of the Assignee data field.

DATA FIELD	DESCRIPTION
Assignee Plural	The ***Assignee Plural*** parameter is used to enter the plural version of the custom name.
Country Name	The ***Country Name*** parameter is used to enter a custom name for the label of the Country data field.
Country Name Plural	The ***Plural*** parameter is used to enter the plural version of the custom name.
Auto-Generate	The ***Auto-Generate*** check box, when checked, configures FileSurf to assign a computer-generated value in the Matter Number data field.
Length	The ***Length*** check box is used to specify the size of the Matter Number data field.
Default Status	The ***Default Status*** check box is used to specify the initial Matter Status when a Matter is first created. Options are: ▫ Active ▫ Closed ▫ Destroyed ▫ Appealed ▫ Opened ▫ Pending ▫ Resolved ▫ Inactive ▫ Unapproved
Default Room	The ***Default Room*** check box is used to specify the initial Location when a Matter is first created. Options are: ▫ 0 (None) ▫ Other locations as defined in the Room Codes and Types screen

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Matters Numbering Configuration Screen

The ***Matters Numbering*** configuration screen, depicted in Figure 2-12, is used to configure the Matters Numbering schema used by your organization.

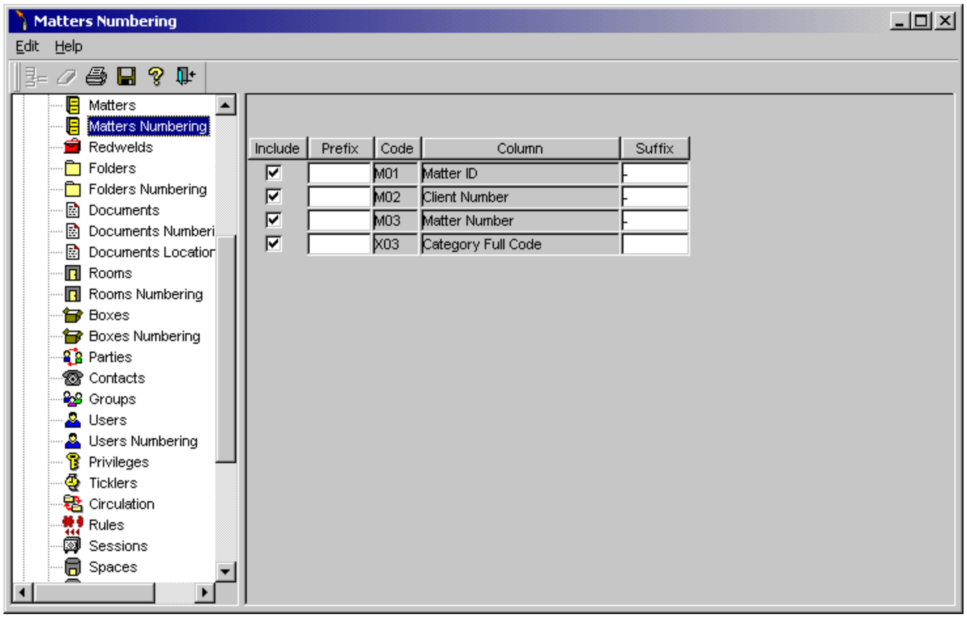

Figure 2-12 Matters Numbering Configuration Screen

Matters Numbering Parameters

The ***Matters Numbering*** Configuration Screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Matter Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Matters Numbering schema. This data is also read-only and cannot be modified.
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application.
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Redwelds Configuration Screen

The ***Redwelds*** configuration screen, depicted in Figure 2-13, is used to configure the parameters that control the characteristics of Redwelds or Jackets that are created in the main program.

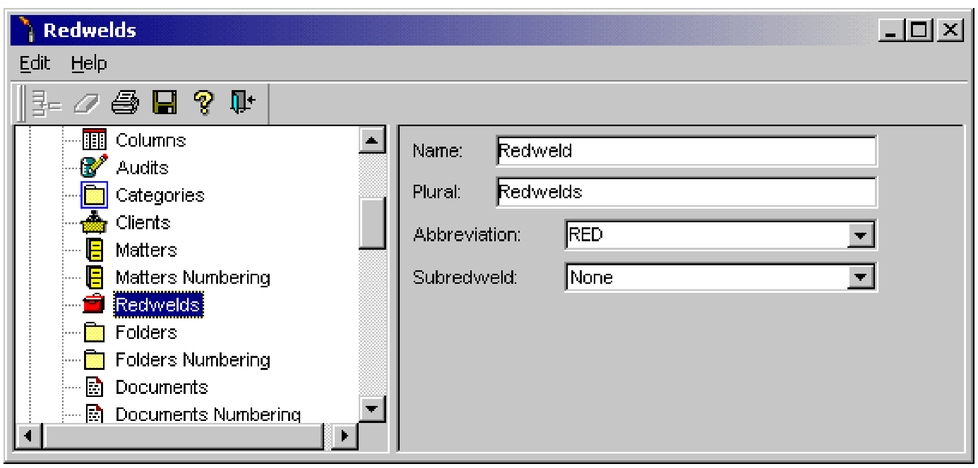

Figure 2-13 Redwelds Configuration Screen

Redweld Parameters

The ***Redweld*** configuration screen consists of four parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for a Redweld. Some organizations use the term Jacket.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for a Redweld.
Abbreviation	The ***Abbreviation*** parameter is used to select the acronym that indicates the Folder Type that is assigned to a Redweld. Options are: ▫ RED ▫ JAK

DATA FIELD	DESCRIPTION
Sub-Redweld	The ***Sub-Redweld*** parameter is used to select the type of characters used in the Sub-Redweld numbering schema. Options are: ▫ None ▫ Arabic Numeral ▫ Roman Numeral

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Folders

The ***Folders*** configuration screen, depicted in Figure 2-14, is used to configure the parameters that control the display of the Folders Form in the main program.

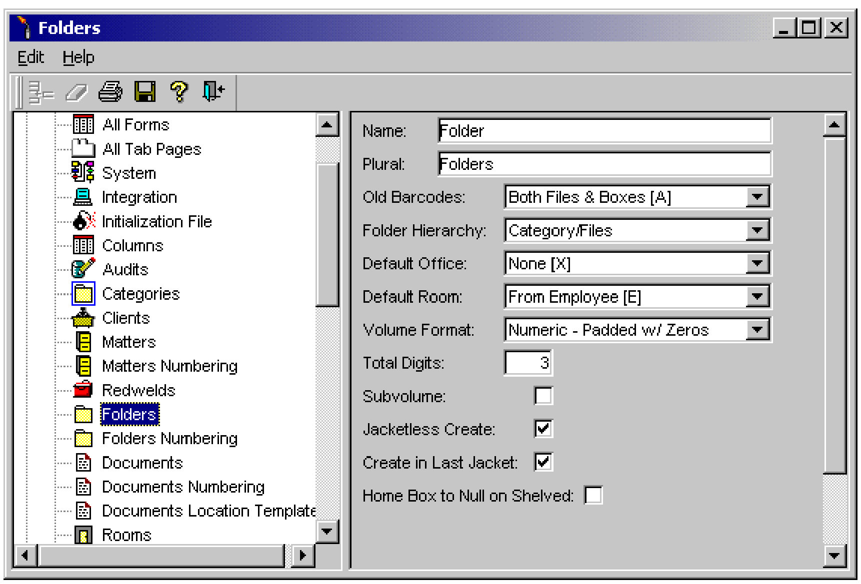

Figure 2-14 Folders Configuration Screen

Folders Parameters

The ***Folders*** configuration screen consists of twelve parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Folders Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Folders Form.
Old Barcodes	The ***Old Barcodes*** parameter is used to configure FileSurf to read and accept non-FileSurf bar codes for objects that may have bar code labels. The options are: ▫ Files ▫ Boxes ▫ Both Files and Boxes ▫ None
Folder Hierarchy	The ***Folder Hierarchy*** parameter is used to specify the Folder Hierarchy structure. Options are: ▫ Client/Matter/Files (for legal installations) ▫ Matter/Files (for client-less installations) ▫ Category/Files (for corporate installations)
Default Office	The ***Default Office*** parameter is used to specify the default office of folders created in the main program. Options are: ▫ None ▫ From Employee (office assigned to the employee that created the folder)
Default Room	The ***Default Room*** parameter is used to specify the default location of folders created in the main program. Options are: ▫ None ▫ From Employee (location assigned to the employee that created the folder) ▫ From Matter (assigned to the location of the office/employee that created the Matter)
Volume Format	The ***Volume Format*** parameter is used to specify the format of folder volume numbers. Options are: ▫ Numeric ▫ Numeric – padded with zeros ▫ Numeric – padded with blank spaces ▫ Roman Numeral (uppercase) ▫ Roman Numeral (lowercase) ▫ Alphabetic Numbering (uppercase) ▫ Alphabetic Numbering (lowercase)
Total Digits	The ***Total Digits*** parameter is used to specify the maximum number of leading zeros to use in the Folder Number (for sorting purposes).
Sub-volume	The ***Sub-volume*** check box, when checked, configures FileSurf to display the Sub-volume numbers on the Folder Form in the main application.

DATA FIELD	DESCRIPTION
Jacketless Create	The ***Jacketless Create*** check box, when checked, configures FileSurf to allow new files to be created without being assigned to a Redweld.
Create In Last Jacket	The ***Create In Last Jacket*** check box, when checked, configures FileSurf to automatically assign a new folder to the last jacket created.
Home Box to Null on Shelved	When marked, this checkbox enables FileSurf to change the Home Box value to "empty" when Folders are shelved in their home location.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Folders Numbering Configuration Screen

The ***Folders Numbering*** configuration screen, depicted in Figure 2-15, is used to configure the Folders Numbering schema used by your organization.

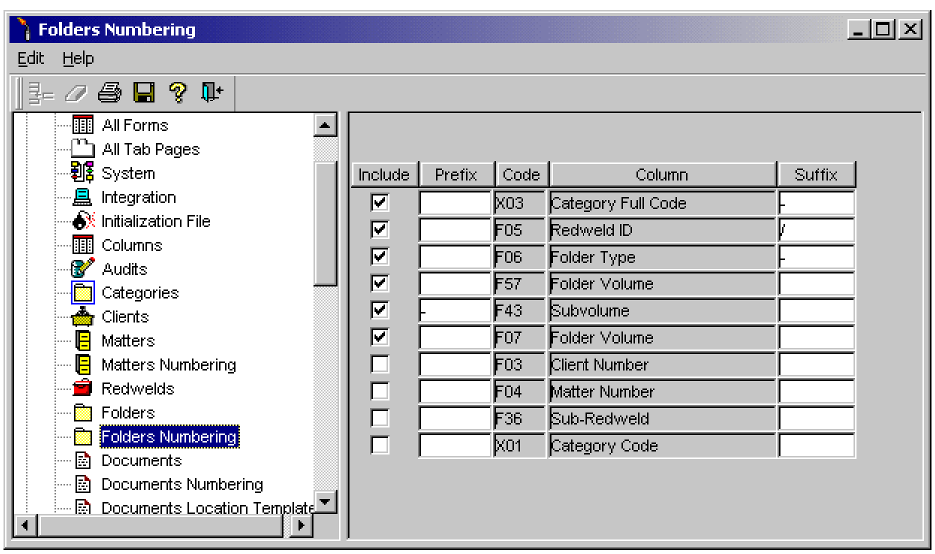

Figure 2-15 Folders Numbering Configuration Screen

Folders Numbering Parameters

The ***Folders Numbering*** Configuration Screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Folder Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Folder Numbering schema. This data is also read-only and cannot be modified.
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application.
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Documents

The ***Documents*** configuration screen, depicted in Figure 2-16, is used to configure the parameters that control the display of the Document Form in the main program.

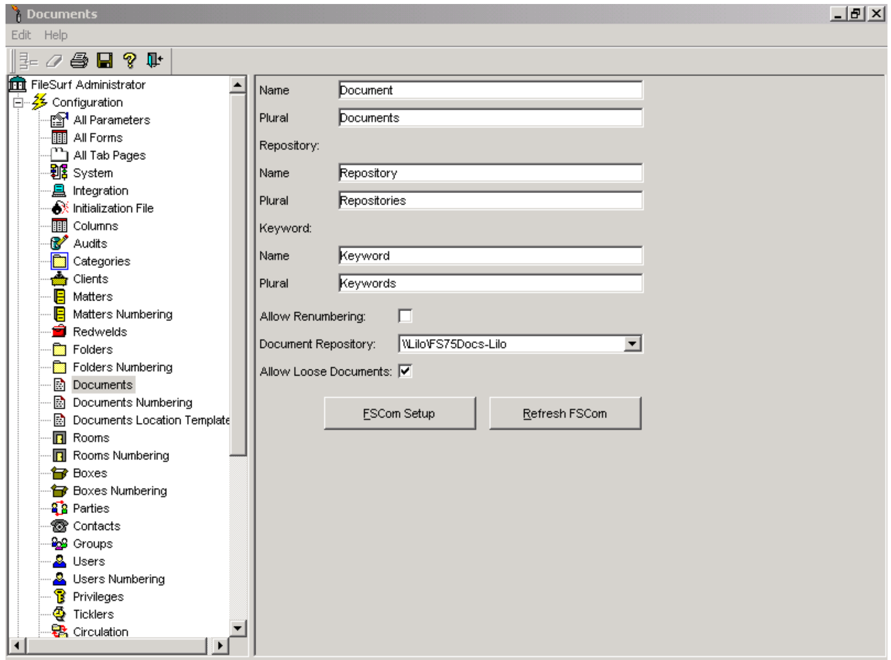

Figure 2-16 Documents Configuration Screen

Documents Parameters

The ***Documents*** configuration screen consists of nine parameters. They are:

DATA FIELD	DESCRIPTION
Document Name	The ***Name*** parameter is used to enter a custom name for the Documents Form. Some organizations use the term ***Record***
Document Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Documents Form
Repository Name	The ***(Repository) Name*** parameter is used to enter a custom term for Repository throughout the Documents Form.
Repository Plural	The ***(Repository) Plural*** parameter is used to enter a custom term for Repositories throughout the Documents Form.
Keyword Name	The ***(Keyword) Name*** parameter is used to enter a custom term for Keyword throughout the Documents Form.
Keyword Plural	The ***(Keyword) Name*** parameter is used to enter a custom term for Keywords throughout the Documents Form.
Allow Renumbering	The ***Allow Renumbering*** check box, when checked, configures FileSurf to allow re-sequencing of documents within a folder.
Document Repository	The ***Document Repository*** parameter is used to enter a name of the default Document Repository.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed

- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

FSCom Setup

The ***FSCom Setup,*** depicted in Figure 2-17, is a tool that gives an Administrator convenient, easy access to all the parameters that control DMS and Email integration with FileSurf.

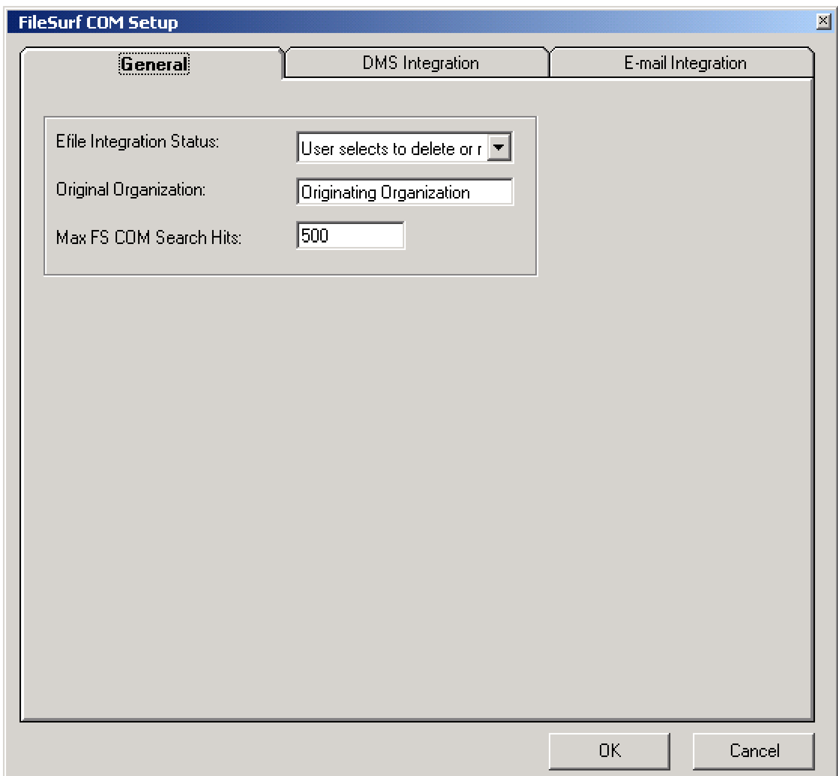

Figure 2-17 FSCom Setup: General

General

The ***FSCom Setup – General Tab*** is composed of three parameters. They are:

DATA FIELD	DESCRIPTION
Efile Integration Status	The ***Efile Integration Status*** parameter is used to configure how FileSurf will handle source documents in electronic formats once they are filed as records. Options are: ▫ Not Available ▫ Delete source upon import ▫ Retain source upon import ▫ User selects to delete or retain source
Original Organization	The ***Original Organization*** parameter is used to enter a default value in the corresponding data field on the Document Profile Form
Max FS COM Search Hits	The ***Max FS COM Search Hits*** parameter is used to define the maximum hits to return in the search results.

DMS Integration

The ***FSCom Setup – DMS Integration Tab,*** depicted in Figure 2-18, is used to configure the parameters that control DMS integration with FileSurf.

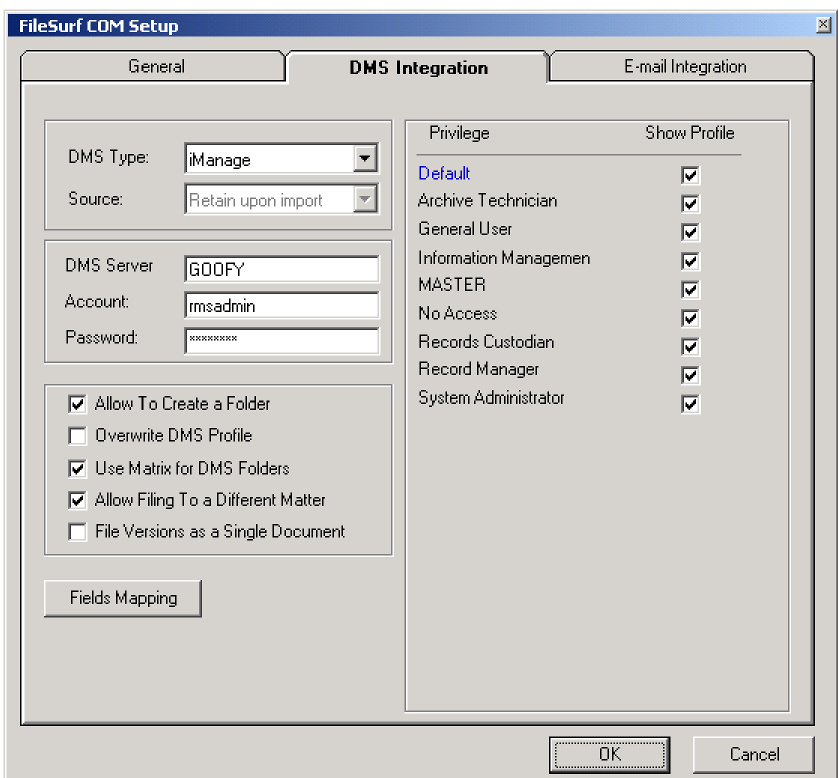

Figure 2-18   FSCom Setup: DMS Integration

The ***FSCom Setup – DMS Integration*** tab is composed of twelve parameters. They are:

DATA FIELD	DESCRIPTION
DMS Type	The ***DMS Type*** parameter is used to enter the name of the document management system integrated with FileSurf. Options are: ▫ None ▫ iManage ▫ DOCSOpen
Source	The ***Source*** parameter is used to configure how FileSurf will handle source documents from a DMS once they are filed as records. Options are: ▫ Not Available ▫ Delete source upon import ▫ Retain source upon import ▫ User selects to delete or retain source
DMS Server	The ***DMS Server*** parameter is used to identify the DMS Server
Account	The ***Account*** parameter is used to identify the DMS Administrative Account.
Password	The ***Password*** parameter is used to note the password for the DMS Admin Account.
Allow To Create a Folder	The ***Allow To Create a Folder*** check box, when checked, configures FileSurf to automatically create the next volume of the Default Folder type if the Default Folder is not available for filing.
Overwrite DMS Profile	The ***Overwrite DMS Profile*** check box is used when filing a DMS document as an attachment to an existing FileSurf document. When checked, configures FileSurf to overwrite the DMS profile.
Use Matrix for DMS Folders	The ***Use Matrix for DMS Folders*** check box, when checked, configures FileSurf to associate FileSurf file types with corresponding DMS document types
Allow Filing To a Different Matter	The ***Allow Filing To a Different Matter*** check box, when checked configures FileSurf to allowing filing in a matter other than the matter specified on the DMS profile.
File Versions as a Single Document	The ***File Versions as a Single Document*** check box, when checked, configures FileSurf to file a DMS document with multiple versions as a single document.
Fields Mapping	The ***Fields Mapping*** dialog box is used to map DMS data fields to FileSurf data fields.

DATA FIELD	DESCRIPTION
Show Profile	When left blank, the Show Profile check box enables "transparent" filing (FileSurf files directly to predetermined location). When marked, FileSurf displays the Document Profile, enabling users to choose file location, document title and other filing options. Mark the Show Profile checkbox that corresponds to the desired Privilege Type. Choose from: ▫ Default ▫ Archive Technician ▫ General User ▫ Information Management ▫ MASTER ▫ No Access ▫ Records Custodian ▫ Record Manager ▫ System Administrator

Email Integration

The ***FSCom Setup – Email Integration Tab,*** depicted in Figure 2-19, is used to configure the parameters that control Email integration with FileSurf.

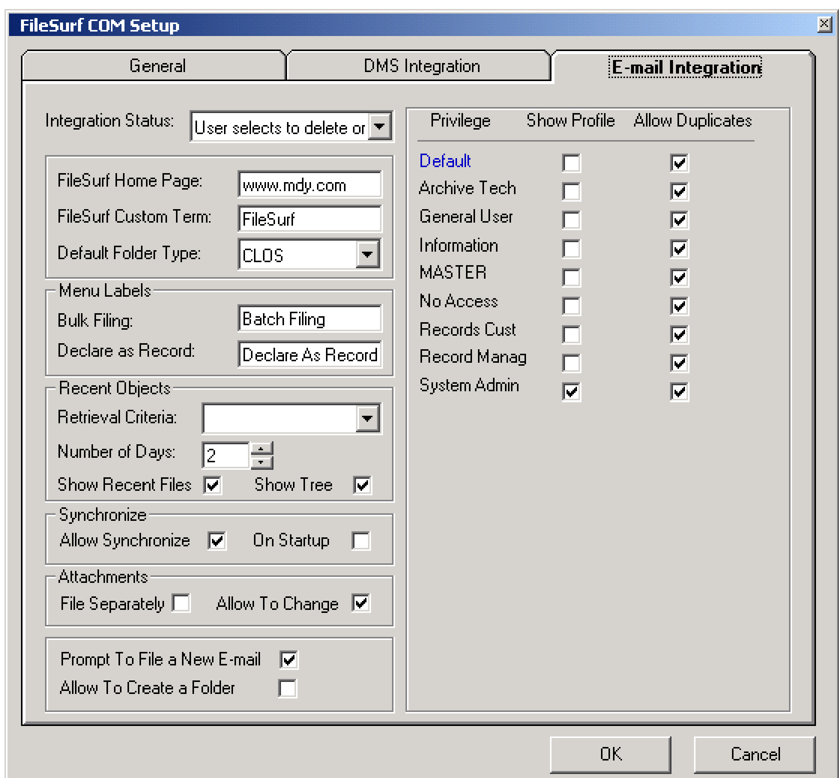

Figure 2-19 FSCom Setup: Email

The ***FSCom Setup – Email Tab*** is composed of twenty parameters. They are:

DATA FIELD	DESCRIPTION
Integration Status	The ***Integration Status*** parameter is used to configure how FileSurf will handle source E-mail messages once they are filed as records. Options are: ▫ Not Available ▫ Delete source upon import ▫ Retain source upon import ▫ User selects to delete or retain source
FileSurf Home Page	The ***FileSurf Home Page*** parameter is used to identify the internal location from which the FileSurf web client is run
FileSurf Custom Term	The ***FileSurf Custom Term*** parameter is used to define your organization's custom term for FileSurf.
Default Folder Type	The ***Default Folder Type*** parameter is used to identify the folder type used for filing e-mail messages.
Bulk Filing	The ***Bulk Filing*** parameter is used to assign a menu label to this function in the e-mail application.
Declare as Record	The ***Declare as Record*** parameter is used to assign a menu label to this function in the e-mail application.
Retrieval Criteria	The ***Retrieval Criteria*** parameter is used to define the criteria for populating the My FileSurf folder in the e-mail application. Choose from: ▫ All ▫ Usage ▫ Assignee
Number of Days	The ***Number of Days…*** parameter is used to enter a preset limit to the number of days used to determine the recently used files displayed in the My FileSurf folder.
Show Recent Files	The ***Show Recent Files*** check box, when checked configures FileSurf to display a list of recently used files in the My FileSurf folder.
Show Tree	The ***Show Tree*** check box, when checked configures FileSurf to display recently used files in a tree hierarchy.
File Separately	The ***File Separately*** check box, when checked configures FileSurf to file e-mail attachments as separate documents.
Allow to Change	The ***Allow to Change*** check box, when checked allows users to choose filing option for e-mail attachments.
Prompt to File a New E-mail	The ***Prompt to File a New E-mail*** check box, when checked configures FileSurf to prompt users to save their e-mail message as a record upon "send".
Allow to Create a Folder	The ***Allow to Create a Folder*** check box, when checked, configures FileSurf to automatically create the next volume of the Default Folder type if the Default Folder is not available for filing.

DATA FIELD	DESCRIPTION
Show Profile	When left blank, the Show Profile check box enables "transparent" filing (FileSurf files directly to predetermined location). When marked, FileSurf displays the Document Profile, enabling users to choose file location, document title and other filing options. Mark the Show Profile checkbox that corresponds to the desired Privilege Type. Choose from: ▫ Default ▫ Archive Technician ▫ General User ▫ Information Management ▫ MASTER ▫ No Access ▫ Records Custodian ▫ Record Manager ▫ System Administrator

Documents Numbering Configuration Screen

The ***Documents Numbering*** configuration screen, depicted in Figure 2-20, is used to configure the Documents Numbering schema used by your organization.

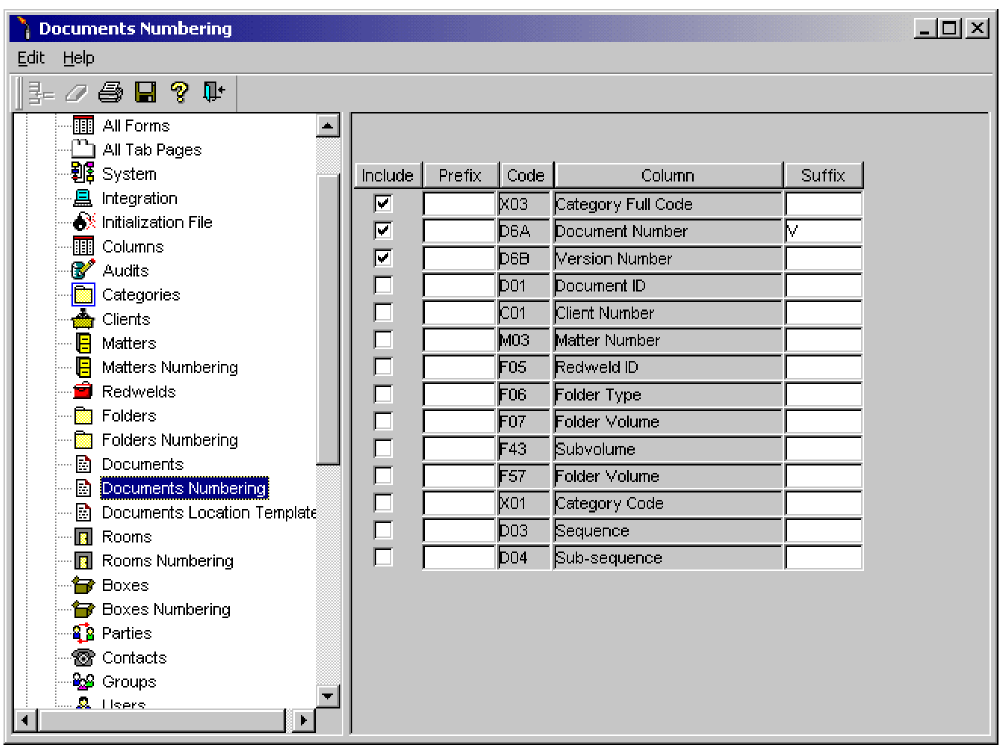

Figure 2-20 Documents Numbering Configuration Screen

Refresh FSCom

The ***Refresh FSCom*** button is used to save and synchronize changes made in the FSCom Setup utility with the FSServer.

Documents Numbering Parameters

The ***Documents Numbering*** Configuration Screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Document Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Document Numbering schema. This data is also read-only and cannot be modified.
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application.
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Documents Location Template

The ***Documents Location Template*** configuration screen, depicted in Figure 2-21, is used to configure the Document Location schema used by your organization.

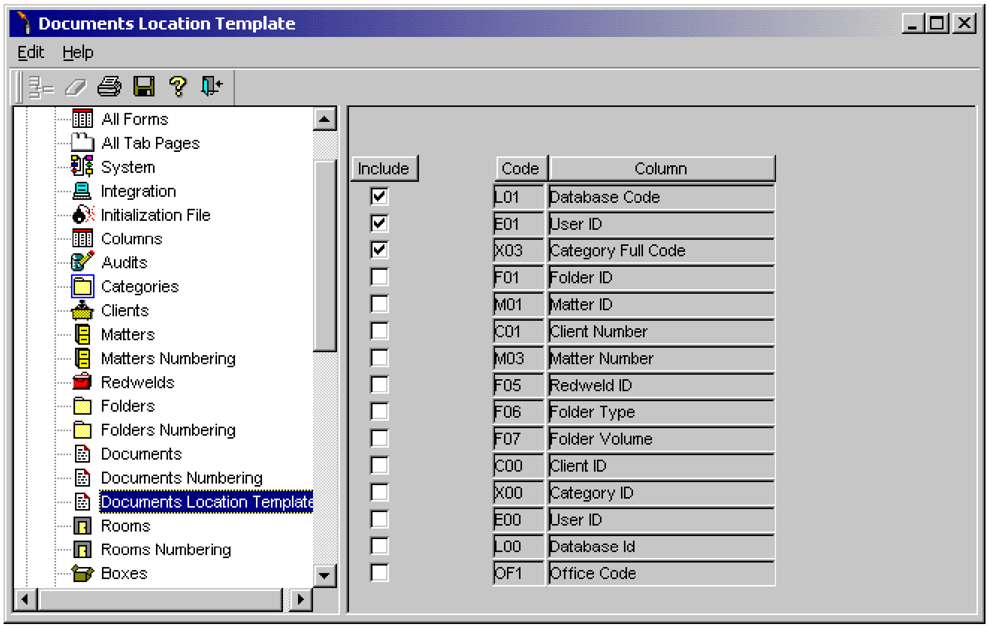

Figure 2-21 Documents Location Template Configuration Screen

Document Location Template Parameters

The ***Document Location Template*** Configuration Screen is composed of three parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Document Location schema.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Document Location schema. This data is also read-only and cannot be modified.

Procedures

- To include a parameter in the Document Location schema, mark the corresponding checkbox under ***Include*** column
- To exclude a parameter in the Document Location schema, unmark the corresponding checkbox under ***Include*** column
- To print the screen, click the ***Print*** icon.

- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application.
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Rooms

The ***Rooms*** configuration screen, depicted in Figure 2-22, is used to specify the terminology used for this Form in the main program.

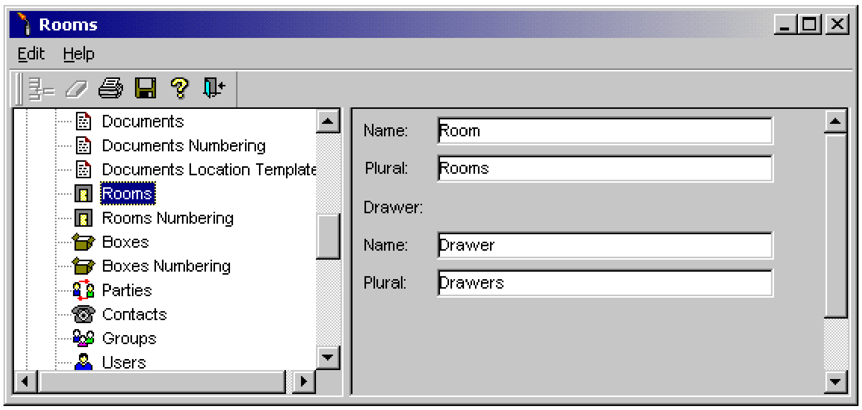

Figure 2-22 Rooms Configuration Screen

Rooms Parameters

The ***Rooms*** form configuration screen consists of four parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Rooms Form. Some organizations use the term Location.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Rooms Form.
Drawer Name	The ***Drawer Name*** parameter is used to enter a custom name for a Drawer (a container within a Room that stores records, such as a File Cabinet).
Drawer Name Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for a Drawer.

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed

- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Rooms Numbering

The ***Rooms Numbering*** configuration screen, depicted in Figure 2-23, is used to configure the format of the Room Number schema used by your organization.

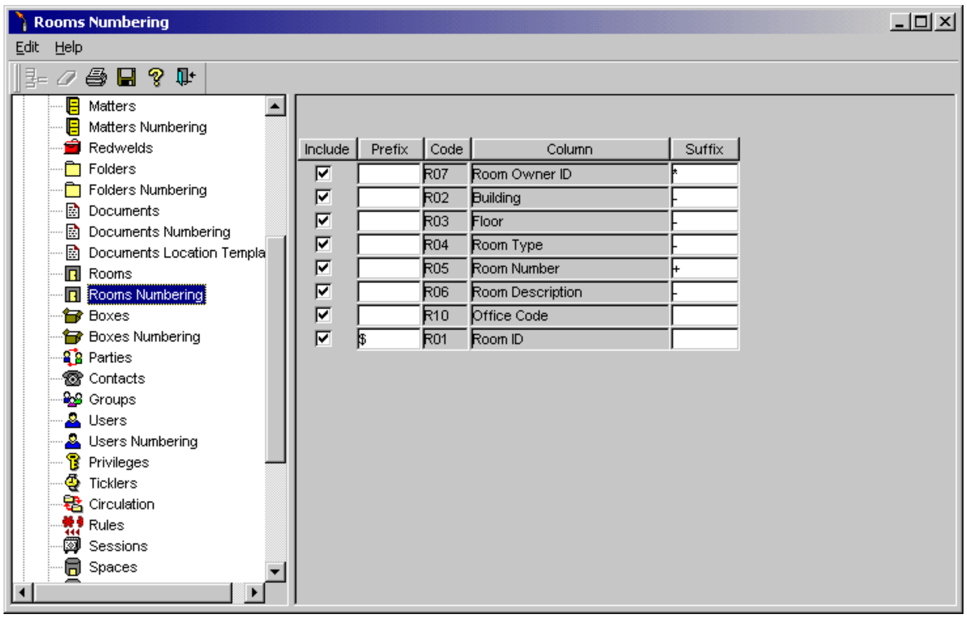

Figure 2-23 Rooms Numbering Configuration Screen

Rooms Numbering Parameters

The ***Rooms Numbering*** configuration screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Rooms Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.

DATA FIELD	DESCRIPTION
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Rooms Numbering schema. This data is also read-only and cannot be modified. They are: ▫ Room Owner ID ▫ Building ▫ Floor ▫ Room Type ▫ Room Number ▫ Room Description ▫ Office Code ▫ Room ID
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the main program to be re-booted.
- To exit the form, click on a different icon. If you choose Exit while there are changes that you have not saved, a pop-up window will ask [Do you want to save changes?]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Boxes

The ***Boxes*** configuration screen, depicted in Figure 2-24, is used to configure the parameters that control the display of the Box Form in the main program.

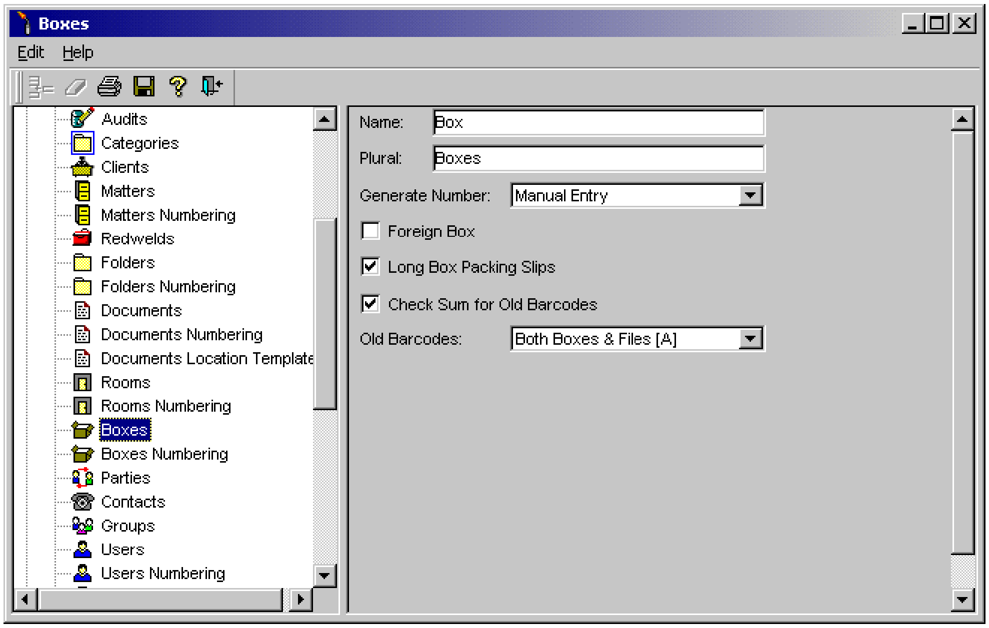

Figure 2-24 Boxes Configuration Screen

Boxes Parameters

The ***Boxes*** form configuration screen consists of seven parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Box Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Box Form.
Generate Number	The ***Generate Number*** is used to check box configure the Box Number data field. Choose a numbering option from: ▫ Manual Entry (number may be entered from keyboard or scan a barcode label) ▫ Unique for a Warehouse (FileSurf generates a unique Box Number for the selected warehouse) ▫ Equal to Box ID (FileSurf generates a Box Number equal to the Box ID)
Foreign Box	The ***Foreign Box*** check box, when checked, configures FileSurf to read and accept a barcode for a box that is not yet registered in the system. FileSurf will create a new record for the box.

DATA FIELD	DESCRIPTION
Long Box Packing Slips	The ***Long Box Slips*** check box, when checked, configures FileSurf to generate Long Packing Slips (manifest or inventory of the box contents – Redwelds and folders). Unchecked specifies the Short Packing Slip (manifest or inventory of the box contents – at the Redwelds level).
Check Sum for Old Barcodes	The ***Check Sum for Old Barcodes*** check box, when checked, configures FileSurf to display the last digit in a bar code, even if the digit is a checksum.
Old Barcodes	The ***Old Barcodes*** parameter is used to configure FileSurf to read and accept non-FileSurf bar codes for objects that may have bar code labels. The options are: ▫ Files ▫ Boxes ▫ Both Files and Boxes ▫ None

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Boxes Numbering

The ***Boxes Numbering*** configuration screen, depicted in Figure 2-25, is used to configure the format of the Box Number schema used by your organization.

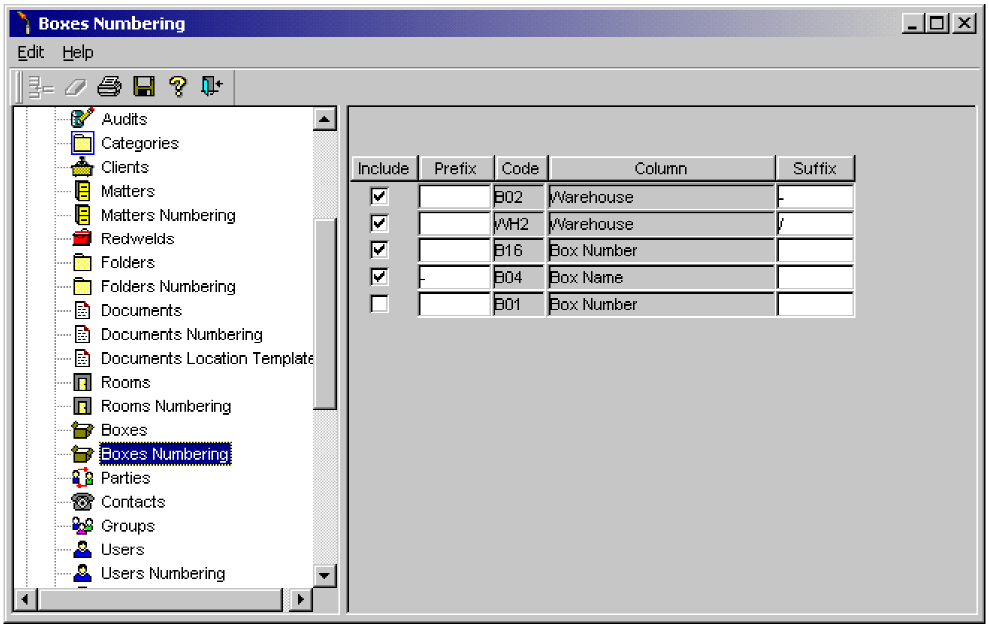

Figure 2-25 Boxes Numbering Configuration Screen

Boxes Numbering Parameters

The ***Boxes Numbering*** configuration screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Box Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Box Numbering schema. This data is also read-only and cannot be modified. They are: ▫ Warehouse Name ▫ Box Number ▫ FS Box ID ▫ Warehouse Number ▫ Box Name
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the main program to be re-booted.
- To exit the form, click on a different icon. If you choose Exit while there are changes that you have not saved, a pop-up window will ask [Do you want to save changes?]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Parties

The ***Parties*** configuration screen, depicted in Figure 2-26, is used to configure the parameters that control the display of the Parties Form in the main program.

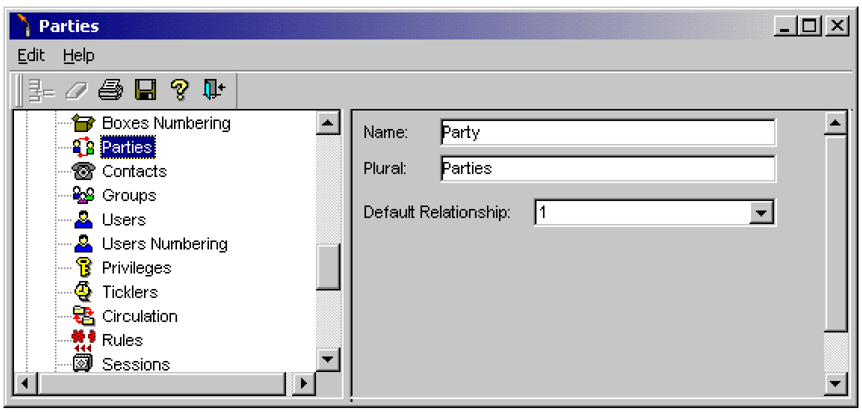

Figure 2-26 Parties Configuration Screen

Parameters

The ***Parties*** form configuration screen consists of three parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Parties Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Parties Form.
Default Relationship	The ***Default Relationship*** parameter is used to configure FileSurf to enter a default value in the Relationship data field for a new Related Party. Select one from the list of Relationships created in the ***Relationship Codes and Types*** screen. The list will be displayed here.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Contacts

The ***Contacts*** configuration screen, depicted in Figure 2-27, is used to specify the terminology used for this Form in the main program.

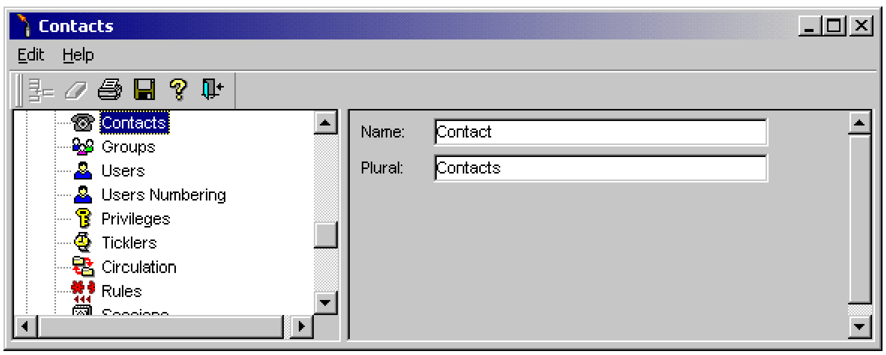

Figure 2-27 Contacts Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Groups

The ***Groups*** configuration screen, depicted in Figure 2-28, is used to configure the parameters that control the display of the Groups Form in the main program.

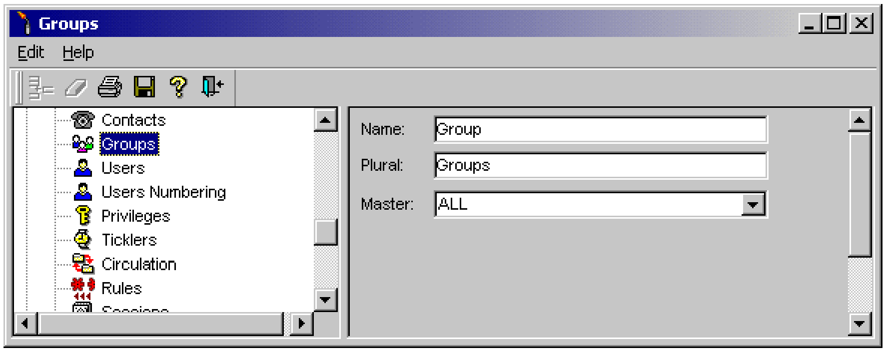

Figure 2-28 Groups Configuration Screen

Groups Parameters

The ***Groups*** form configuration screen consists of three parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Groups Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Groups Form.
Master	The ***Master*** parameter is used to enter the name of the “Master” user group. This Master user group is a default work group that new users are automatically assigned to. Select the name of the Group to serve as the Master Group from the list of Groups.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Users

The ***Users*** configuration screen, depicted in Figure 2-29, is used to configure the parameters that control the display of the Users Form in the main program.

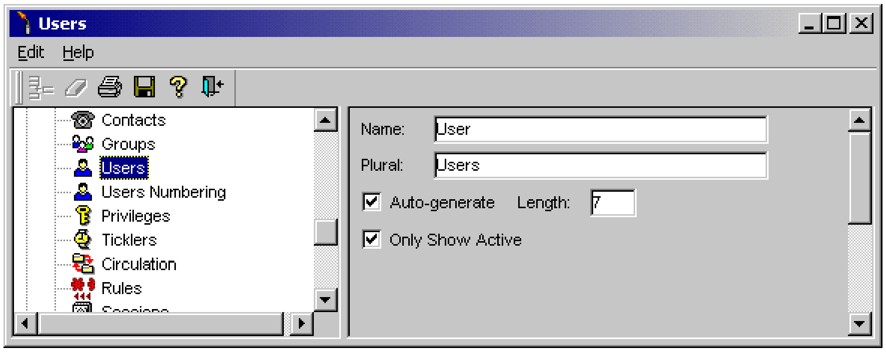

Figure 2-29 Users Configuration Screen

Users Parameters

The ***Users*** configuration screen consists of five parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Users Form. Many organizations use the term Employee.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Users Form.
Auto-Generate	The ***Auto-Generate*** check box, when checked, configures FileSurf to assign a computer-generated value in the User ID data field.
Length	The ***Length*** check box is used to specify the size of the User ID data field.
Only Show Active	The ***Only Show Active*** check box, when checked, configures FileSurf to display only the names of users with active accounts.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Users Numbering

The ***Users Numbering*** configuration screen, depicted in Figure 2-30, is used to configure the format of the User Number schema used by your organization.

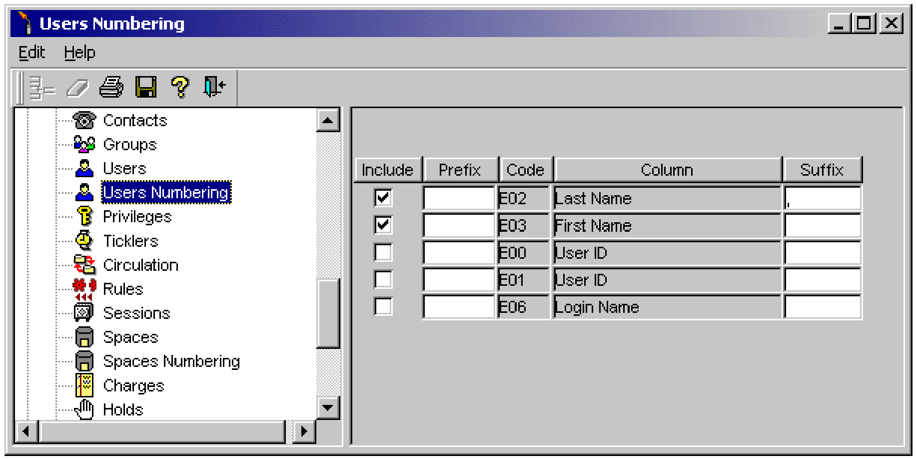

Figure 2-30 Users Numbering Configuration Screen

Users Numbering Parameters

The ***Users Numbering*** configuration screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the User Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the User Numbering schema. This data is also read-only and cannot be modified. They are: ▫ Last Name ▫ First Name ▫ User ID ▫ User ID ▫ Login Name
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the main program to be re-booted.
- To exit the form, click on a different icon. If you choose Exit while there are changes that you have not saved, a pop-up window will ask [Do you want to save changes?]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Privileges

The ***Privileges*** configuration screen, depicted in Figure 2-31, is used to specify the terminology used for this Form in the main program.

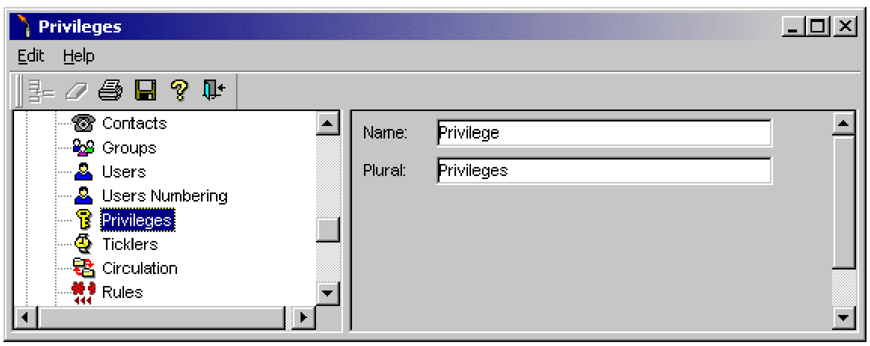

Figure 2-31 Privileges Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Ticklers Configuration Screen

The ***Ticklers*** configuration screen, depicted in Figure 2-32, is used to configure the parameters that control the display of the Tickler Form in the main program.

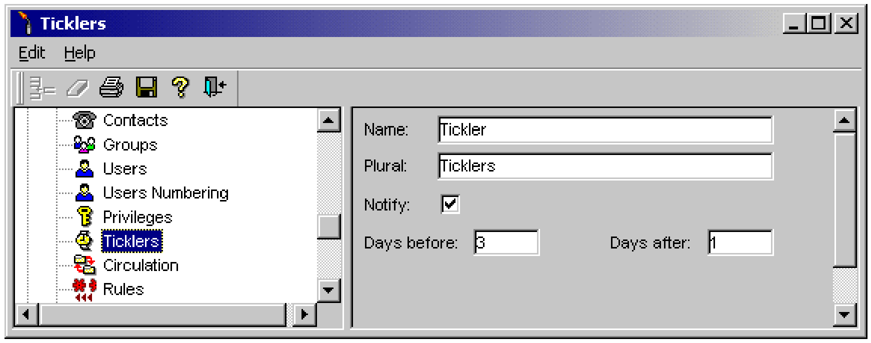

Figure 2-32 Ticklers Configuration Screen

Ticklers Parameters

The ***Ticklers*** form configuration screen consists of five parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Ticklers Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Ticklers Form.
Notify	The ***Notify*** check box, when checked, configures FileSurf to automatically send Tickler notifications to the user assigned to the Tickler action (Reviewer).
Days Before	The ***Days Before*** parameter is used to enter the numbers of days before a scheduled Tickler action that FileSurf should begin sending Tickler notifications.
Days After	The ***Days After*** parameter is used to enter the numbers of days after a scheduled Tickler action that FileSurf should continue to send Tickler notifications.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Circulation

The ***Circulation*** configuration screen, depicted in Figure 2-33, is used to configure the parameters that control the display of the Circulation Form in the main program.

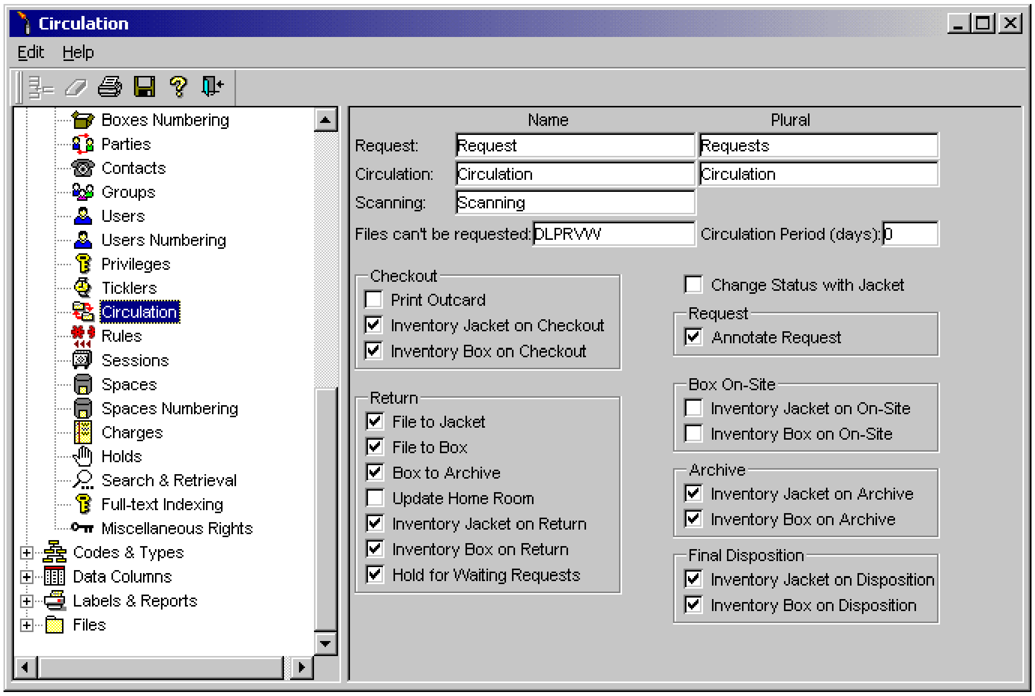

Figure 2-33 Circulation Configuration Screen

Circulation Parameters

The Circulation configuration screen consists of 25 parameters. They are:

DATA FIELD	DESCRIPTION
Request Name	The ***Name*** parameter is used to enter a custom name for the Form used to ***Request*** folders.
Request Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the ***Request*** function.
Circulation Name	The ***Circulation*** parameter is used to enter a custom name for the Circulation History Form
Circulation Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the ***Circulation*** function.
Scanning	The ***Scanning*** parameter is used to enter a custom name for the scanning function
Files Can't Be Requested	The ***Files Can't Be Requested*** parameter is used to identify the statuses of Folders that cannot be requested
Circulation Period	The ***Circulation Period (days)*** parameter is used to enter the maximum numbers of days that a folder can be checked-out.
Change Status with Jacket	The ***Change Status with Jacket*** parameter is used to indicate folders cannot be circulated without their Jacket

DATA FIELD	DESCRIPTION
Print Outcard	The ***Print Outcard*** check box, when checked, configures FileSurf to generate a placeholder for folders that have been checked-out.
Inventory Jacket on Checkout	The ***Inventory Jacket on Checkout*** check box, when checked, configures FileSurf to require that sub-files must be scanned when checking out a Redweld.
Inventory Box on Checkout	The ***Inventory Box on Checkout*** check box, when checked, configures FileSurf to require that the contents of the Box must be scanned when checking out a Box.
Annotate Request	The ***Annotate Request*** check box, when checked, configures FileSurf to activate the Annotate function that provides the user with the capability to: ▫ Request folders with or without its Redweld ▫ Request folders for another user ▫ Mark the request "Rush" to give it a higher priority for processing ▫ Specify a "Process After" processing date ▫ Enter descriptive notes about the request
File to Jacket	The ***File to Jacket*** check box, when checked, configures FileSurf to automatically reassign a file to its home Redweld upon check-in.
File to Box	The ***File to Box*** check box, when checked, configures FileSurf to automatically reassign a file to its Home Box upon check-in.
Box to Archive	The ***Box to Archive*** check box, when checked, configures FileSurf to automatically archive a Box (Status A) rather than return it to a shelf (Status S), upon check-in.
Update Home Room	The ***Update Home Room*** check box, when checked, configures FileSurf to allow the user to change the Home Room of folders being returned.
Inventory Jacket on Return	The ***Inventory Jacket on Return*** check box, when checked, configures FileSurf to require that sub-files must be scanned when checking in a Redweld.
Inventory Box on Return	The ***Inventory Box on Return*** check box, when checked, configures FileSurf to require that sub-files must be scanned when checking in a Box.
Hold for Waiting Requests	The ***Hold for Waiting Requests*** check box, when checked, configures FileSurf to automatically hold files that are on the waist list. When not checked, FileSurf will prompt the user if files that are on the wait list should be placed on hold.
Inventory Jacket on On-Site	The ***Inventory Jacket on On-Site*** check box, when checked, configures FileSurf to require that sub-files must be scanned when a Redweld is Boxed-On-Site.
Inventory Box on On-Site	The ***Inventory Box on On-Site*** check box, when checked, configures FileSurf to require that the contents of a box be scanned when a group of folders are Boxed-On-Site.

DATA FIELD	DESCRIPTION
Inventory Jacket on Archive	The ***Inventory Jacket on Archive*** check box, when checked, configures FileSurf to require that sub-files must be scanned when a Redweld is Archived.
Inventory Box on Archive	The ***Inventory Box on Archive*** check box, when checked, configures FileSurf to require that the contents of a Box be scanned when a Box is Archived.
Inventory Jacket on Disposition	The ***Inventory Jacket on Disposition*** check box, when checked, configures FileSurf to require that the contents of a Redweld be scanned when a Redweld is processed for Final Disposition.
Inventory Box on Disposition	The ***Inventory Box on Disposition*** check box, when checked, configures FileSurf to require that the contents of a Box be scanned when the Box is processed for Final Disposition.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose Exit while there are changes that you have not saved, a pop-up window will ask ***[Do you want to save changes?].*** Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Rules

The ***Rules*** configuration screen, depicted in Figure 2-34, is used to configure the parameters that control the display of the Retention Form in the main program.

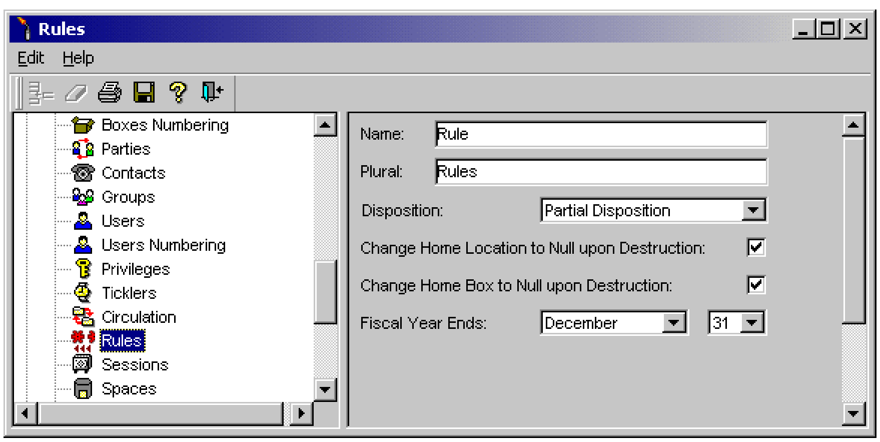

Figure 2-34 Rules Configuration Screen

Rules Parameters

The ***Rules*** configuration screen consists of six parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Rules Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Rules Form.
Disposition	The ***Disposition*** column lists Disposition Types that may be used in your organization. They are: ▫ Full Disposition ▫ Partial Disposition ▫ No Disposition
Change Home Location to Null upon Destruction	The ***Change Home Location to Null Upon Destruction*** check box, when checked, configures FileSurf to enter to a Null value in a file's home location upon destruction.
Change Home Box to Null upon Destruction	The ***Change Home Location to Null Upon Destruction*** check box, when checked, configures FileSurf to enter to a Null value in a file's home box location upon destruction.
Fiscal Year Ends	The ***Fiscal Year Ends*** parameter is used to enter the last month and day of the organization's fiscal year. This is required to calculate retention periods that are based upon fiscal rather than calendar years.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Sessions

The ***Sessions*** configuration screen, depicted in Figure 2-35, is used to specify the terminology used for this Form in the main program.

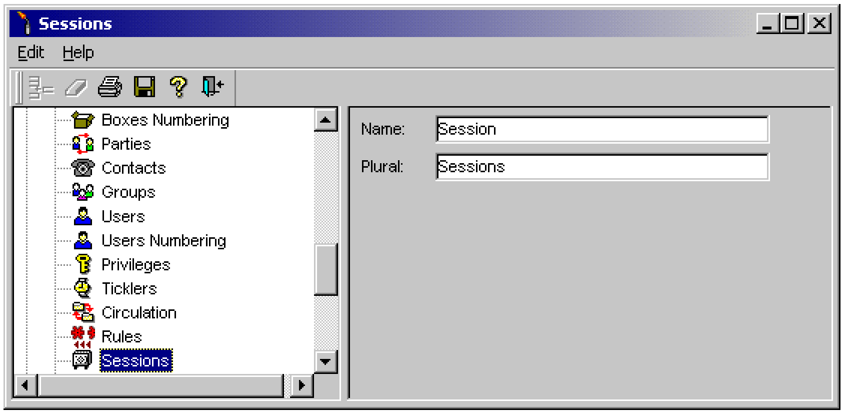

Figure 2-35 Sessions Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Spaces

The ***Spaces*** configuration screen, depicted in Figure 2-36, is used to specify the terminology used for this Form in the main program.

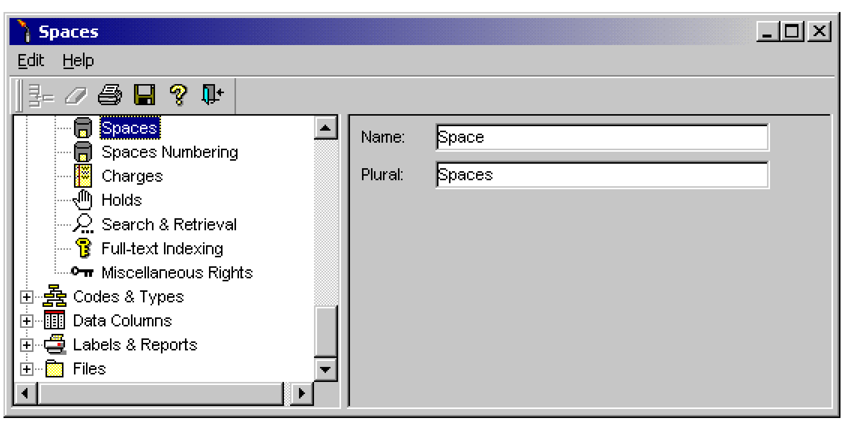

Figure 2-36 Spaces Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Spaces Numbering

The ***Spaces Numbering*** configuration screen, depicted in Figure 2-25, is used to configure the format of the warehouse Spaces Number schema used by your organization.

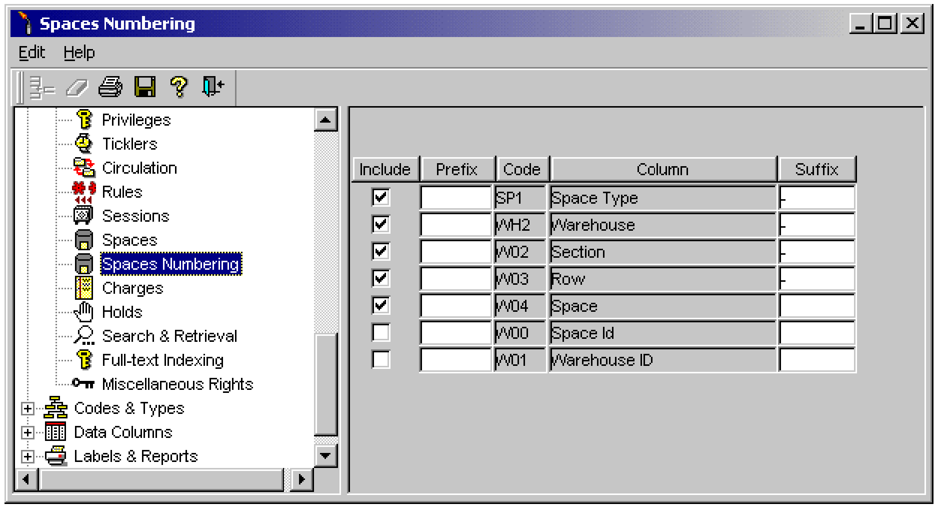

Figure 2-37 Spaces Numbering Configuration Screen

Spaces Numbering Parameters

The ***Spaces Numbering*** configuration screen is composed of five parameters. They are:

DATA FIELD	DESCRIPTION
Include	The ***Include*** check box, when checked, configures to FileSurf to include the item in the selected Column in the Spaces Numbering schema.
Prefix	The ***Prefix*** column is used to enter a prefix or separator character in front of the item listed in the selected Column.
Code	The ***Code*** column identifies the internal code used by FileSurf for the item listed in the selected Column. This data is read-only and cannot be modified.
Column	The ***Column*** column identifies the FileSurf objects whose numbers may be included in the Space Numbering schema. This data is also read-only and cannot be modified. They are: ▫ Space Type ▫ Warehouse ▫ Section ▫ Row ▫ Space ▫ Space ID ▫ Warehouse ID
Suffix	The ***Suffix*** column is used to enter a suffix or separator character to follow the item listed in the selected Column.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To print the screen, click the ***Print*** icon.
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires the main program to be re-booted.
- To exit the form, click on a different icon. If you choose Exit while there are changes that you have not saved, a pop-up window will ask [Do you want to save changes?]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Charges

The ***Charges*** configuration screen depicted in Figure 2-38 is used to specify the terminology used for this Form in the main program.

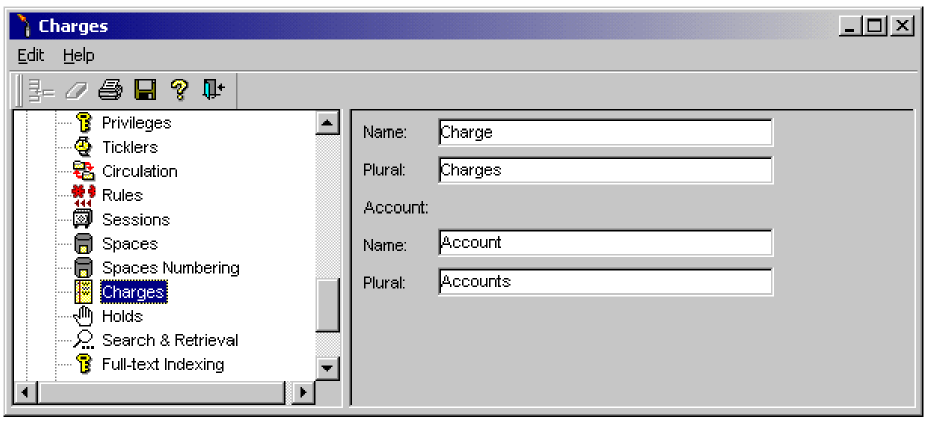

Figure 2-38 Charges Configuration Screen

Charges Parameters

The ***Charges*** form configuration screen consists of four parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Charges Form.
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Charges Form.
Account Name	The ***Name*** parameter is used to enter a custom term for Account Name.
Account Plural	The ***Plural*** parameter is used to enter the plural version of the custom term for Account.

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Holds

The ***Holds*** configuration screen depicted in Figure 2-39, is used to specify the terminology used for this Form in the main program.

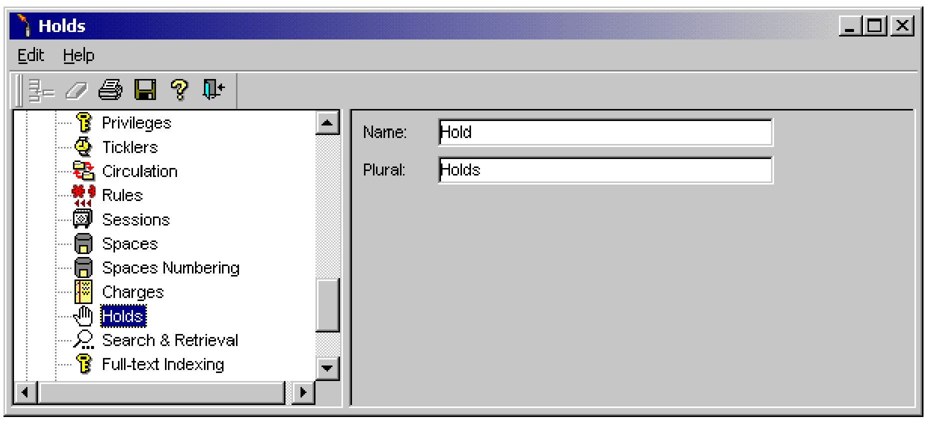

Figure 2-39 Holds Configuration Screen

Procedures

To apply your organization's terminology to this form, use the following procedures:

- Click any where in the ***Name*** or ***Plural*** field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken

Search and Retrieval

The ***Search and Retrieval*** configuration screen, depicted in Figure 2-40, is used to configure the parameters that control the features of the Search and Retrieval function.

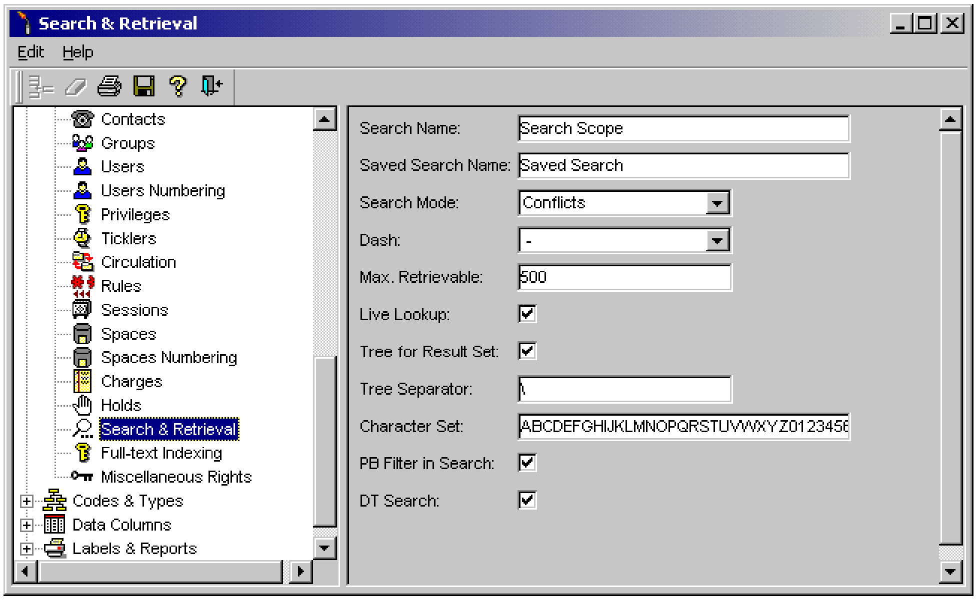

Figure 2-40 Search and Retrieval Configuration Screen

Search and Retrieval Parameters

The ***Search and Retrieval*** configuration screen consists of thirteen parameters.

DATA FIELD	DESCRIPTION
Search Name	The ***Search Name*** parameter is used to enter a custom name for the Search & Retrieval Form.
Saved Search Name	The ***Saved Search Name*** parameter is used to enter a custom name for the Saved Search function
Search Mode	The ***Search Mode*** parameter is used to enter the appropriate Search Mode. The options are: ▫ Full Search ▫ Conflicts Search
Dash	The ***Dash*** parameter is used to specify the separator character
Max. Retrievable	The ***Max Retrievable*** parameter is used to enter the maximum number of hits to return in the search results.
Live Lookup	The ***Live Lookup*** check box, when checked, configures FileSurf to set default for the Live Lookup checkbox to “marked”in data fields that employ user pick lists.
Tree for Result Set	The ***Tree for Result Set*** check box, when checked, configures FileSurf to display search results in a tree format.
Tree Separator	The ***Tree Separator*** parameter is used to enter the character that will serve as the separator between levels in the tree.

DATA FIELD	DESCRIPTION
Character Set	The ***Character Set*** parameter is used to identify the characters that are useable in search patterns
PB Filter in Search	The ***PB Filter in Search*** checkbox, when checked, enables Power Builder filter functionality at the application level; When unchecked, Power Builder filter functionality is enabled only at the database level
DT Search	The ***DTSearch*** checkbox, when checked, enables DTSearch functionality

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

Full-Text Indexing

The ***Full-Text Indexing*** configuration screen, depicted in Figure 2-41, is used to specify which data fields, from the FileSurf database, are to be indexed for full text searching via the Full Search Form.

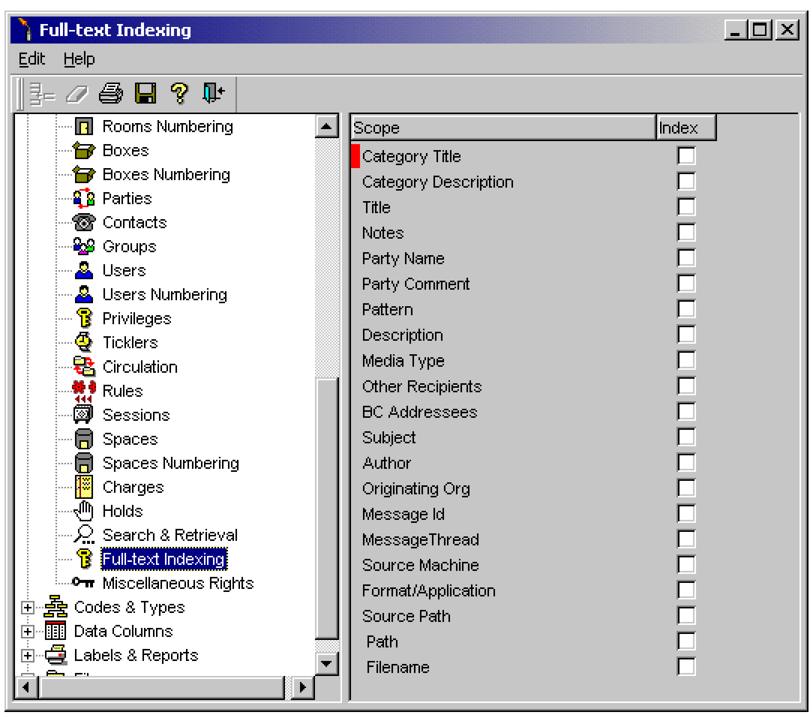

Figure 2-41 Full-Text Indexing Configuration Screen

Full Text Indexing Parameters

The ***Full-Text Indexing*** configuration screen is composed of two data columns. They are:

DATA FIELD	DESCRIPTION
Scope	The ***Scope*** data column is the list of test data fields maintained in the FileSurf database. This data is read-only and cannot be modified. You may click on the column to sort the names in alphabetical order making it easier for you to find a particular field.
Index	The ***Index*** column consists of check boxes that correspond to each text data field. When checked, this configures to include text Form the data field in the index.

Miscellaneous Rights Configuration Screen

The ***Miscellaneous Rights*** configuration screen, depicted in Figure 2-42, is used to configure FileSurf to activate three miscellaneous functions.

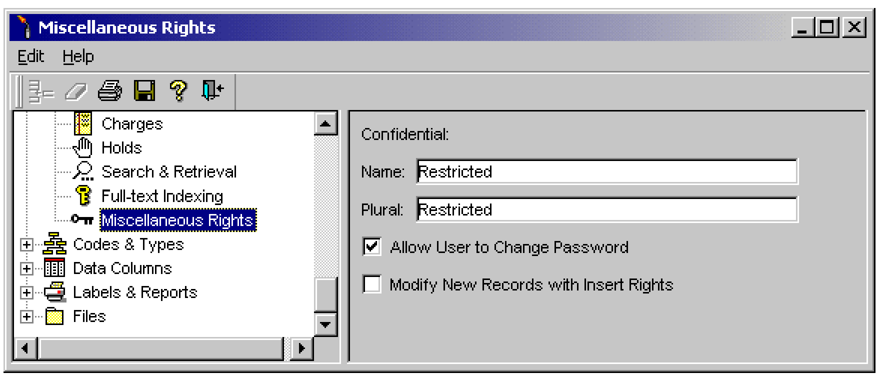

Figure 2-42 Miscellaneous Rights Configuration Screen

Miscellaneous Rights Parameters

The ***Miscellaneous Rights Configuration*** screen is composed of four parameters. They are:

DATA FIELD	DESCRIPTION
Name	The ***Name*** parameter is used to enter a custom name for the Confidential/Restricted functionality
Plural	The ***Plural*** parameter is used to enter the plural version of the custom name for the Confidential/Restricted functionality.
Allow User to Change Password	The ***Allow User to Change Password*** check box, when checked, configures FileSurf to provide the user with the capability to change his/her password.

DATA FIELD	DESCRIPTION
Modify New Records with Insert Rights	The ***Modify New Records with Insert Rights*** check box, when checked, configures FileSurf to allow a user that has just created a database record (FileSurf object such as category, folder, rule, document profile, etc.) to continue to modify the record until the user moves to another record. Once the user leaves the newly created record, he will no longer be able to modify the record unless he has administrative privileges to do so.

Procedures

- To modify a parameter, click any where in the field to select all data and enter the new parameter as instructed
- To save your additions or corrections, click the ***Save*** icon. FileSurf will prompt you when a parameter change requires restarting the main application
- To print the screen, click the ***Print*** icon
- To exit the form, click on a different icon. If you choose ***Exit*** before you have saved your changes, a pop-up window will prompt you with save options [***Do you want to save changes?***]. Choose ***Yes*** to save and exit, ***No*** to discard your changes and exit or ***Cancel*** to return to the Form with no action taken.

CHAPTER 3

CODES AND TYPES

What you will learn in this chapter:

- How to maintain and modify the list of system codes
- How to and define the values presented in the form of pick lists

General

This chapter shows you how to maintain the list of system codes and define the values presented in pick lists. By so doing, you control what is allowed in certain data fields and make data entry as simple as point and click.

Matter Status

The ***Matter Status*** codes and types screen, depicted in Figure 3-1, is used to define and maintain the list of terms that describe Matter Statuses. The Matter Status pick list is displayed on the Matter Form in the main program. There are no limits to the number of Matter Statuses that can be added to the list. You may add new or edit existing Matter Statuses either in the main program or here. Matter Statuses that are not in use can be deleted in the Administrator program – not in the main application.

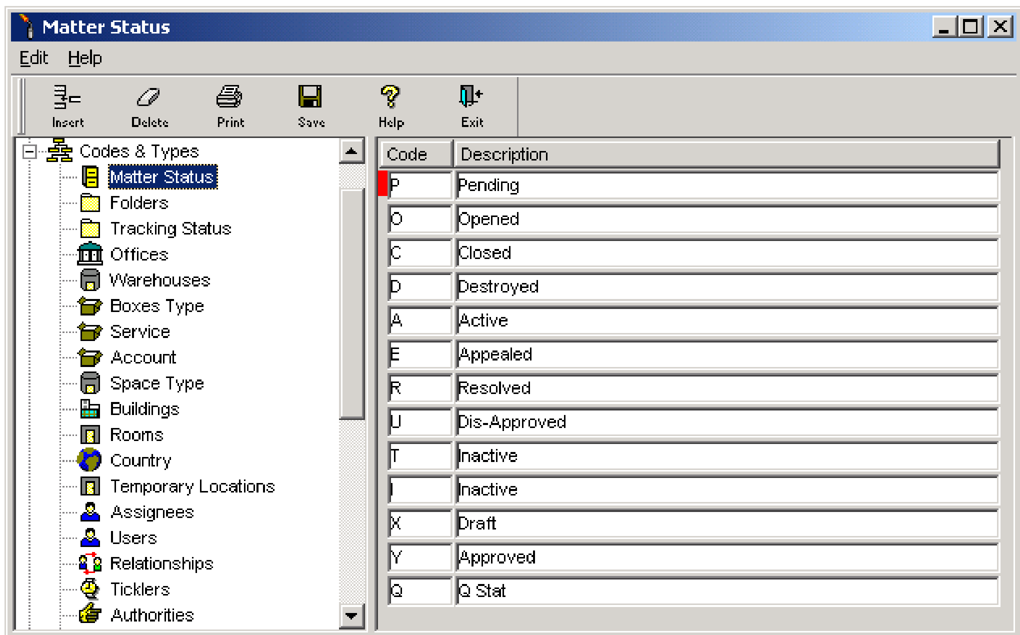

Figure 3-1 Matter Status

Adding a New Matter Status

The procedure for adding a new ***Matter Status*** is as follows:

- Expand Codes and Types
- Click the Matter Status icon
- Click the Insert icon
- Enter a unique code (up to 3 alphanumeric characters) for the Matter Status in the Code data field (mandatory)
- Enter a descriptive status name for the new status in the Description data field
- Click the ***Save*** icon to save your work.

Editing a Matter Status

The procedure for editing a ***Matter Status*** is as follows:

- Expand Codes and Types
- Click the *Matter Status* icon
- Click on the *Code* or *Description* entry to be modified and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting a Matter Status

The procedure for deleting a ***Matter Status*** is as follows:

- Expand Codes and Types
- Click the *Matter Status* icon
- Click on the Code data field of the status term to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note*: You can only delete Matter Statuses that are not in use in the Administration program. If an "in use" Matter Status is selected for deletion, FileSurf will display the following warning: "You still have this status assigned to [number of] matters". To delete this status, you will first need to substitute a different matter status on all matters using this status. Then, retry the deletion.*

Folder Types

The ***Folder Types*** codes screen, depicted in Figure 3-2, is used to define and maintain the list of Folder Types. The Folder Type pick list is displayed on the Category, Matter, Folder and Document Forms in the main program. There are no limits to the number of Folder Types that can be added to the list. You may add new or edit existing Folder Types either in the main program or here. You can only delete Folder Types that are not in use in the Administration program.

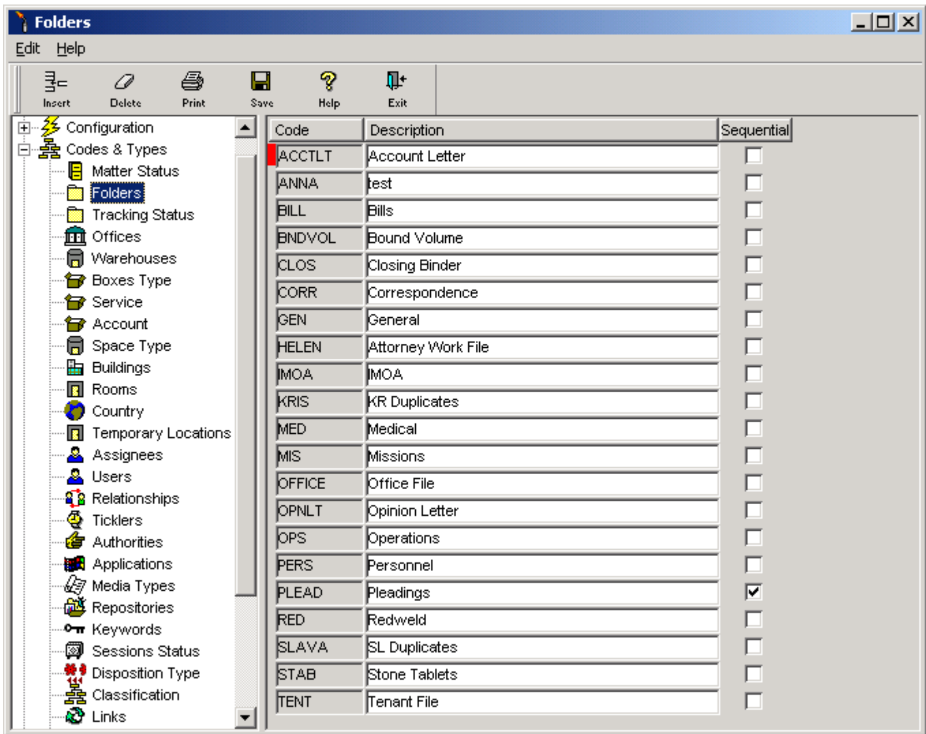

Figure 3-2 Folders Type Codes

Adding a New Folder Type

The procedure for adding a new ***Folder Type*** is as follows:

- Expand Codes and Types
- Click the *Folder Types* icon
- Click the Insert icon
- Enter a unique short name (up to 6 alphanumeric characters) for the Folder Type in the *Code* data field (mandatory)
- Tab to the *Description* data field and enter a descriptive name for the new Folder Type
- Check the *Sequential* check box, if document numbers are to be sequential across differing volumes of the same Folder, otherwise the first document in each volume will be numbered 1
- Click the ***Save*** icon to save your work.

Editing Folder Types

The Folder Type code data field is read-only and cannot by modified. The procedure for editing the ***Folder Types*** Description data field is as follows:

- Expand Codes and Types
- Click the *Folders* icon
- Click on the *Description* data field and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Folder Types

The procedure for deleting a ***Folder Type*** is as follows:

- Expand Codes and Types
- Click the Folder Types icon
- Click on the Code data field of the Folder Type to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete Folder Types that are not in use in the Administration program. If an "in use" Folder Type is selected for deletion, FileSurf will display the following warning: "You still have this type assigned to [number of] folder". To delete this Folder Type, you will first need to substitute a different folder type on all Folders using this folder type. Then, retry the deletion.*

Tracking Status

The ***Tracking Status*** codes screen, depicted in Figure 3-3, is used to define and maintain the list of Tracking Status descriptions. The Tracking Status pick list is displayed on the Category, Matter and Folder Forms in the main program.

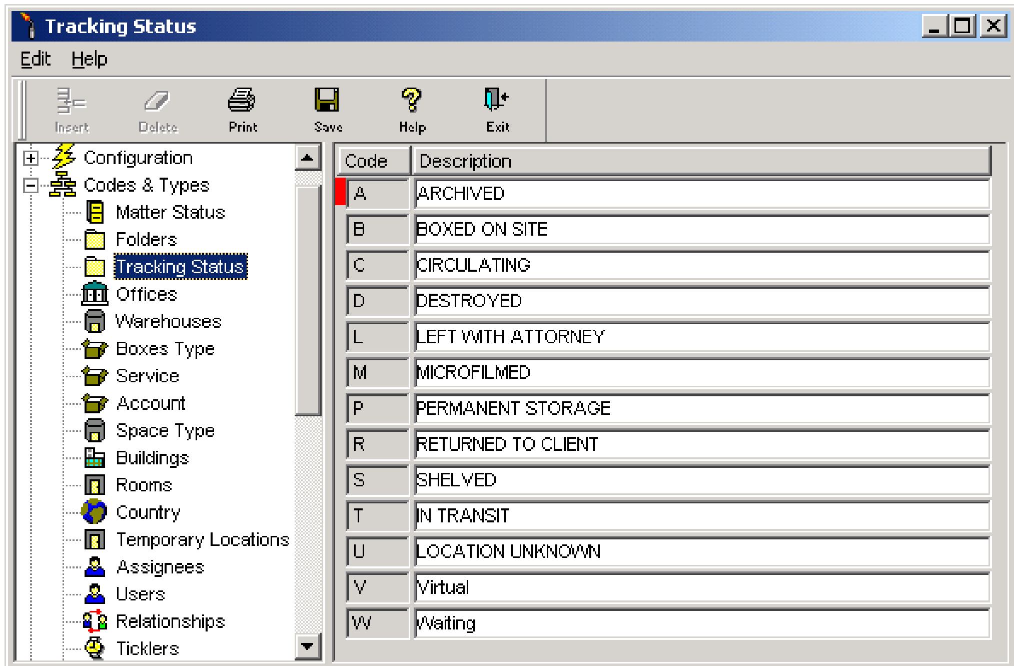

Figure 3-3 Tracking Status Codes

The list of Tracking Status descriptions is hard-coded in the database and cannot be modified or removed. You may modify the *Description* of existing Tracking Statuses to make them more meaningful to your organization.

Editing Tracking Status Codes

The procedure for editing the Tracking Status Description data fields is as follows:

- Expand Codes and Types
- Click the *Tracking Status* icon
- Click anywhere in the Description data field to select all text, then make the necessary modifications
- Click the ***Save*** icon to save your work.

Offices

The ***Offices*** codes and types screen, depicted in Figure 3-4, is used to define and maintain the list of descriptions that describe Offices. The Offices pick list is displayed on the Client, Matter, Folder, Document, User, Room and Box Forms in the main program. There are no limits to the number of Offices that can be added to the list.

You may add new or edit existing Office descriptions either in the main program or here. Office descriptions can only be deleted via the Administrator program – not in the main application.

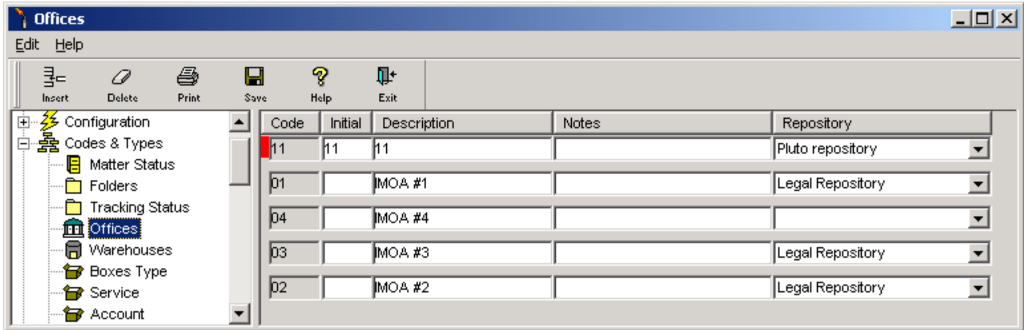

Figure 3-4 Office Codes and Types

Adding Office Codes

The procedure for adding a new ***Office*** description is as follows:

- Expand Codes and Types
- Click the *Office* icon
- Click the Insert icon
- Enter a unique short name (up to 8 alphanumeric characters) for the *Office* in the Code data field (mandatory)
- Tab to the *Initial* data field and enter a unique initial (up to 5 alphanumeric characters) (optional)
- Tab to the *Description* data field and enter a descriptive name (mandatory)
- Tab to the *Notes* data field and enter a descriptive notes (optional)
- Tab to the *Repository* data field and the Select a default document repository for this Office from Repository pick list
- Click the ***Save*** icon to save your work.

Editing Office Codes

All of the Office data fields may be modified except for the Code data field. The procedure for editing all other ***Office*** data fields is as follows:

- Expand Codes and Types
- Click the *Office* icon
- Click anywhere in the data field to be modified to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Office Codes

You cannot delete an ***Office*** code that is in use. The procedure for deleting an ***Office*** code that is not in use is as follows:

- Expand Codes and Types
- Click the Office icon
- Click on the Code data field of the Office to be deleted

- Click the Delete icon
- Click the ***Save*** icon to save your work.

> ***Note**: You can only delete Office Types that are not in use in the Administration program. If an "in use" Office Type is selected for deletion, FileSurf will display the following warning: "You still have [number of] rooms listed for this Office". To delete this Office Type, you will first need to substitute a different Office type on all rooms using this Office type. Then, retry the deletion.*

Warehouses

The ***Warehouses*** codes screen, depicted in Figure 3-5, is used to define and maintain the list of Warehouses. These warehouses represent any off-site records storage facility. On-site storage facilities, such as a central records room, are considered the record's "Home Room" and are listed in the Room Codes and Types.

When a box of files is archived, the Box must be assigned to a Warehouse. The Warehouse pick list is displayed on the Box Form in the main program. There are no limits to the number of Warehouses that can be added to the list.

You may add new or edit existing Warehouse descriptions either in the main program or here. Warehouse descriptions can only be deleted via the Administrator program – not in the main application.

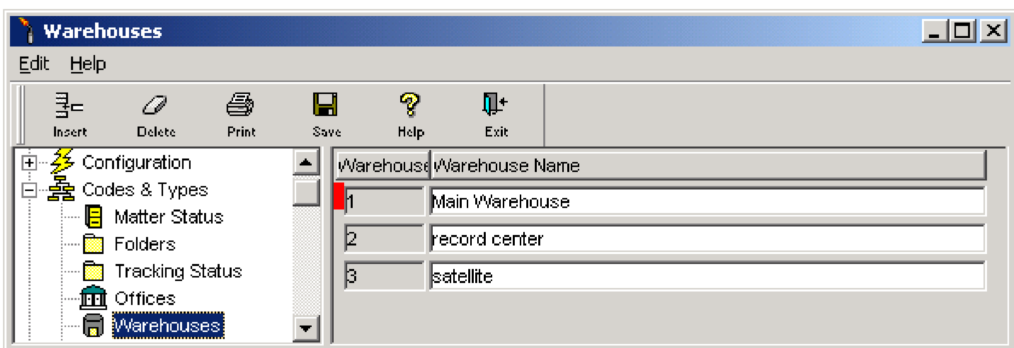

Figure 3-5 Warehouse Codes

Adding Warehouse Codes

The procedure for adding a new ***Warehouse*** description is as follows:

- Expand Codes and Types
- Click the *Warehouse* icon
- Click the Insert icon
- Enter a descriptive name in the Description data field
- FileSurf will automatically assign a unique internal Code for the Warehouse
- Click the ***Save*** icon to save your work.

Editing Warehouse Codes

Only the ***Warehouse Name*** data field may be modified; the ***Code*** data field is read-only. The procedure for editing ***Warehouse*** name data fields is as follows:

- Expand Codes and Types
- Click the *Warehouse* icon
- Click on the Description data field and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Warehouse Codes

You cannot delete a ***Warehouse*** code that is in use. The procedure for deleting a ***Warehouse*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Warehouse* icon
- Click on the Code data field of the Warehouse to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Warehouses that are not in use in the Administration program. If an "in use" Warehouse is selected for deletion, FileSurf will display the following warning: "You still have [number of] Boxes assigned to this Warehouse". To delete this Warehouse, you will first need to substitute a different warehouse on all Boxes using this warehouse. Then, retry the deletion.*

Box Types

The ***Box Types*** codes screen, depicted in Figure 3-6, is used to define and maintain the list of Box Type descriptions and their corresponding warehouse charges. The Box Type pick list is displayed on the Boxes Form in the main program

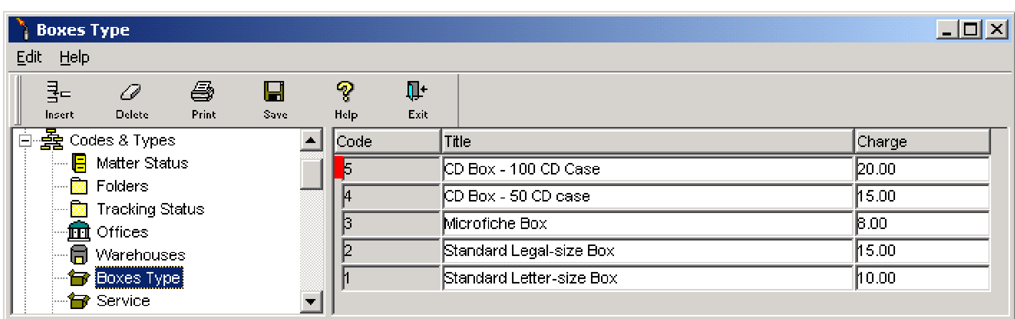

Figure 3-6 Box Types Codes

These Box Types represent containers used for off-site records storage as well as their transport to and from those facilities. The Box Type codes are also utilized in the Space Management module and referenced in the ***Space Type*** codes (discussed later in this chapter). The Charges referred to in the Box Types code are used to calculate off-site storage fees.

You may add new or edit existing Box Types either in the main program or here. Box Types can only be deleted via the Administrator program – not in the main application.

Adding Box Type Codes

The procedure for adding a new ***Box Type*** is as follows:

- Expand Codes and Types
- Click the *Boxes Type* icon
- Click the Insert icon
- Enter a unique short name (up to 8 alphanumeric characters) for the Box Type in the Code data field
- Tab to the *Title* data field and enter a descriptive name
- Tab to the *Charge* data field and enter the appropriate dollar amount
- Click the ***Save*** icon to save your work.

Editing Box Type Codes

All of the ***Box Type*** data fields may be modified except for the Code data field. The procedure for editing all other ***Box Type*** data fields is as follows:

- Expand Codes and Types
- Click the Box Type icon
- Click anywhere in the desired data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Box Type Codes

You cannot delete a ***Box Type*** code that is in use. The procedure for deleting a ***Box Type*** code that is not in use is as follows:

- Expand Codes and Types
- Click the Box Type icon
- Click on the Code data field of the Box Type to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note*: You can only delete Box Types that are not in use in the Administration program. If an "in use" Box Type is selected for deletion, FileSurf will display the following warning: "You still have this type assigned to [number of Boxes]". To delete this Box Type, you will first need to substitute a different Box Type on all Boxes that use it; then, retry the deletion.*

Services

The ***Services*** codes screen, depicted in Figure 3-7, is used to define and maintain the list of Services offered and performed by off-site storage facilities. These Services, together with the Account codes (discussed later in this chapter), are used to calculate and generate services and storage billing reports.

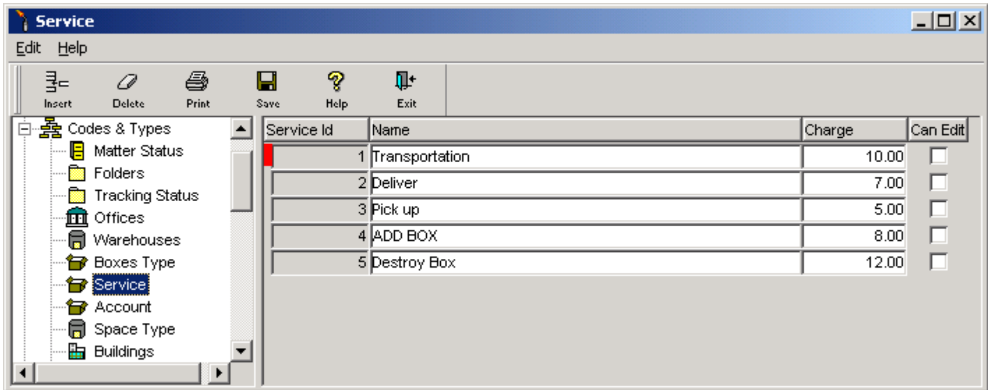

Figure 3-7 Service Codes

When services are tracked (via the main program), a Service description, applicable fees, Account name and quantity must be provided. The Services pick list is displayed on the Charges Form in the main program. There are no limits to the number of Services that can be added to the list.

You may add new or edit existing Services either in the main program or here. Service descriptions can only be deleted via the Administrator program – not in the main application.

Adding Services Codes

The procedure for adding a new ***Service*** description is as follows:

- Expand Codes and Types
- Click the *Services* icon
- Click the Insert icon
- Enter a descriptive name in the *Name* data field (FileSurf will automatically assign a unique internal Code for the Service ID)
- Tab to the *Charge* data field and enter the appropriate dollar amount for this Service
- Tab to the *Can Edit* checkbox. Mark the checkbox if the dollar amount for the selected Service should be editable in the main program. By default, this checkbox is unmarked, making this service rate a read-only field
- Click the ***Save*** icon to save your work.

Editing Services Codes

All of the Services data fields may be modified except for the Service ID. The procedure for editing all other ***Services*** data fields is as follows:

- Expand Codes and Types

- Click the *Services* icon
- Click anywhere in the *Description* data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Services Codes

You cannot delete a ***Service*** code that is in use. The procedure for deleting a ***Service*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Services* icon
- Click on the Code data field of the Services to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Services that are not in use in the Administration program. If an "in use" Service is selected for deletion, FileSurf will display the following warning: "You still have this Service assigned to [number of] Charges". To delete this Service code, you will first need to substitute a different Service code on all charges using this Service then, retry the deletion.*

Accounts

The ***Accounts*** codes screen, depicted in Figure 3-8, is used to define and maintain the list of Account descriptions. These Account descriptions, together with the Services (discussed earlier) are used to track and generate billing reports for services performed by an off-site storage facility (Warehouse).

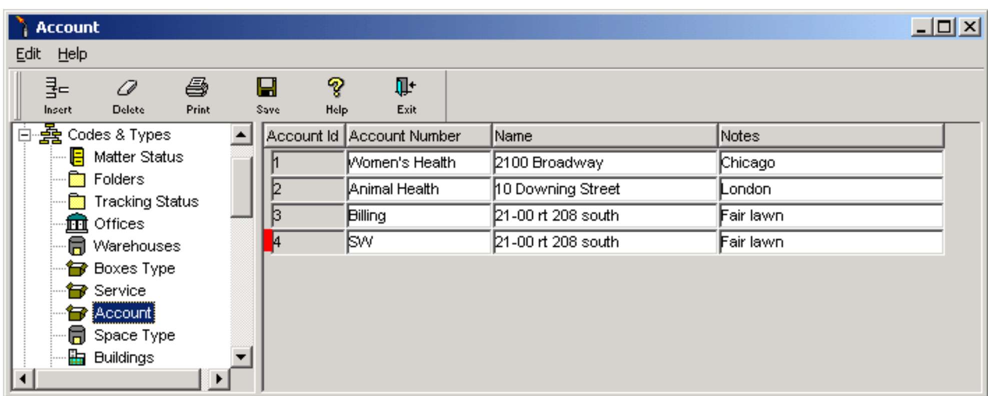

Figure 3-8 Account Codes

When a box of files is archived, the Box must be assigned to an Account. The Account pick list is displayed on the Box Form in the main program. There are no limits to the number of Accounts that can be added to the list.

You may add new or edit existing Account descriptions either in the main program or here. Account descriptions can only be deleted via the Administrator program – not in the main application.

Adding Account Codes

The procedure for adding a new ***Account*** description is as follows:

- Expand Codes and Types
- Click the *Accounts* icon
- Click the Insert icon (FileSurf will automatically assign a unique internal Code for the Account ID)
- Enter a unique short name (up to 20 alphanumeric characters) for the *Account Number* data field
- Tab to the *Name* data field and enter a descriptive name
- Tab to the *Notes* data field and enter any appropriate notes or comments
- Click the ***Save*** icon to save your work

Editing Account Codes

All of the Account data fields may be modified except for the Account ID. The procedure for editing all other ***Account*** data fields is as follows:

- Expand Codes and Types
- Click the *Accounts* icon
- Click anywhere in the desired data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work

Deleting Account Codes

You cannot delete an ***Account*** code that is in use. The procedure for deleting an ***Account*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Accounts* icon
- Click on the Code data field of the Account to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note*: You can only delete Accounts that are not in use in the Administration program. If an "in use" Account is selected for deletion, FileSurf will display the following warning: "You still have this Account assigned to [number of] Boxes". To delete this Account, you will first need to substitute a different Account on all Boxes using this Account then, retry the deletion.*

Space Types

The ***Space Type*** codes screen, depicted in Figure 3-9, is used to define and maintain the list of Space Types. Space Types describe the space on or in which your records are maintained in the records center.

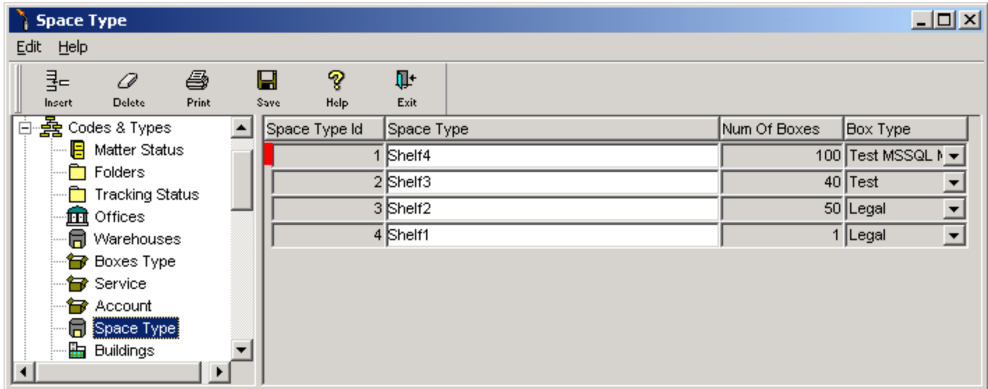

Figure 3-9 Space Type Codes

Space Types are used in connection with the Space Management Module (accessed via the main program). The Space Type ID pick list is displayed on the Spaces Form in the main program. There are no limits to the number of Spaces Types that can be added to the list.

You may add new or edit existing Space Types either in the main program or here. Space Types can only be deleted via the Administrator program – not in the main application.

Adding Space Codes

The procedure for adding a new ***Space Type*** is as follows:

- Expand Codes and Types
- Click the *Space Type* icon
- Click the Insert icon
- Enter a descriptive name in the *Space Type* data field
- FileSurf will automatically assign a unique internal Code for the Space Type ID
- Tab to the *Num of Boxes* data field and enter the number of boxes the new space can accommodate
- Tab to the *Box Type* and enter the type of box the new space will accommodate
- Click the ***Save*** icon to save your work

Editing Space Codes

The ***Space Type*** data field is read-only and cannot be modified. The procedure for editing ***Space Type*** data fields is as follows:

- Expand Codes and Types
- Click the *Space Type* icon
- Click anywhere in the Space Type data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Space Codes

You cannot delete a ***Space Type*** that is in use. The procedure for deleting a ***Space Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Space Type* icon
- Click on the Code data field of the Space Type to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Space Types that are not in use in the Administration program. If an "in use" Type is selected for deletion, FileSurf will display the following warning: "You still have this Type assigned to [number of] Spaces". To delete this Space Type, you will first need to substitute a different Space Type on all Spaces using this Type then, retry the deletion.*

Buildings

The ***Buildings*** codes and types screen, depicted in Figure 3-10, is used to define and maintain the list of your organization's Buildings. Buildings are one of the data fields used to describe Rooms or Locations within your organization where active records may be stored. These rooms or locations are created on the Rooms Form in the main application.

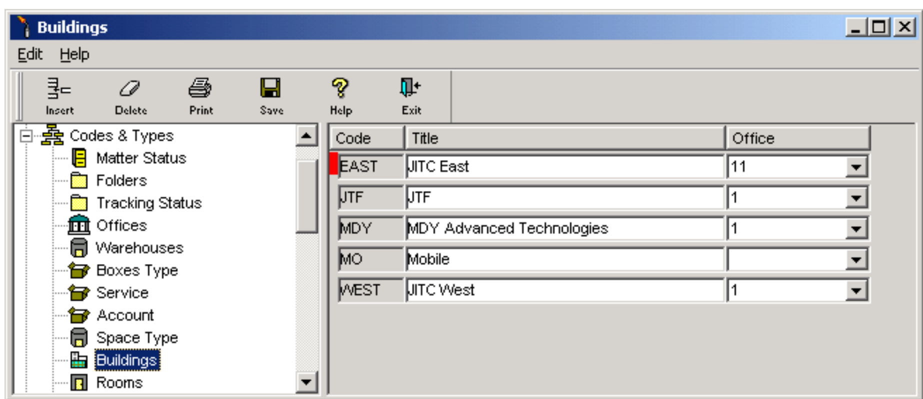

Figure 3-10 Building Codes and Types

There are no limits to the number of Buildings that can be added to the list. You may add new or edit existing Building descriptions either in the main program or here. Building descriptions can only be deleted via the Administrator program – not in the main application.

Adding Buildings

The procedure for adding a new ***Building*** description is as follows:

- Expand Codes and Types
- Click the *Buildings* icon
- Click the Insert icon
- Enter a unique short name (up to 4 alphanumeric characters) for the Building in the *Code* data field
- Tab to the *Title* data field and enter a descriptive name (mandatory)
- Tab to the *Office* data field and select a default responsible office from the Office pick list

- Click the ***Save*** icon to save your work.

Editing Building Codes

All of the ***Building*** data fields may be modified except for the ***Code*** data field. The procedure for editing all other ***Building*** data fields is as follows:

- Expand Codes and Types
- Click the *Buildings* icon
- Click anywhere in the desired data field to select all text then; make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Building Codes

You cannot delete a ***Building*** code that is in use. The procedure for deleting a ***Building*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Buildings* icon
- Click on the Code data field of the Building to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

> ***Note**: You can only delete Building Codes that are not in use in the Administration program. If an “in use” Building is selected for deletion, FileSurf will display the following warning: “You still have this [number of] Rooms listed for this location”. To delete this Building code, you will first need to substitute a different Building code on all locations using this code then, retry the deletion.*

Rooms

The ***Rooms*** codes and types screen, depicted in Figure 3-11, is used to define and maintain the list of descriptions that describe the types of ***Rooms*** or other locations in your organization where active records may be stored. There are no limits to the number of ***Room Types*** that can be added to the list.

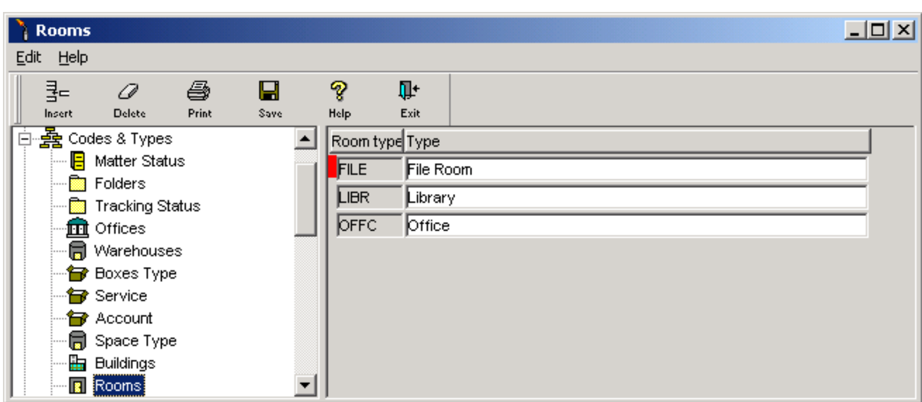

Figure 3-11 Room Codes and Types

You may add new or edit existing ***Room Types*** either in the main program or here. ***Room Types*** can only be deleted via the Administrator program – not in the main application.

Adding Room Types

The procedure for adding a new ***Room Type*** is as follows:

- Expand Codes and Types
- Click the *Rooms* icon
- Click the Insert icon
- Enter a unique short name (up to 4 alphanumeric characters) for the Room Type in the *Code* data field
- Tab to the *Type* data field and enter a descriptive name
- Click the ***Save*** icon to save your work.

Editing Room Types

The Room ***Code*** data field is read-only and cannot be modified. The procedure for editing the ***Type*** data fields is as follows:

- Expand Codes and Types
- Click the *Rooms* icon
- Click anywhere in the *Type* data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Room Types

You cannot delete a ***Room Type*** description that is in use. The procedure for deleting a ***Room Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Rooms* icon
- Click on the Code data field of the Room to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete Room Types that are not in use in the Administration program. If an "in use" Type is selected for deletion, FileSurf will display the following warning: "You still have this Type assigned to [number of] Rooms". To delete this Room Type, you will first need to substitute a different Room Type on all Rooms using this Type then, retry the deletion.*

Country

The ***Country*** codes screen, depicted in Figure 3-12, is used to define and maintain the list of Countries that may have jurisdiction over the Matters managed by your organization. The Country pick list is displayed on the Matter Form in the main program. There are no limits to the number of ***Countries*** that can be added to the list.

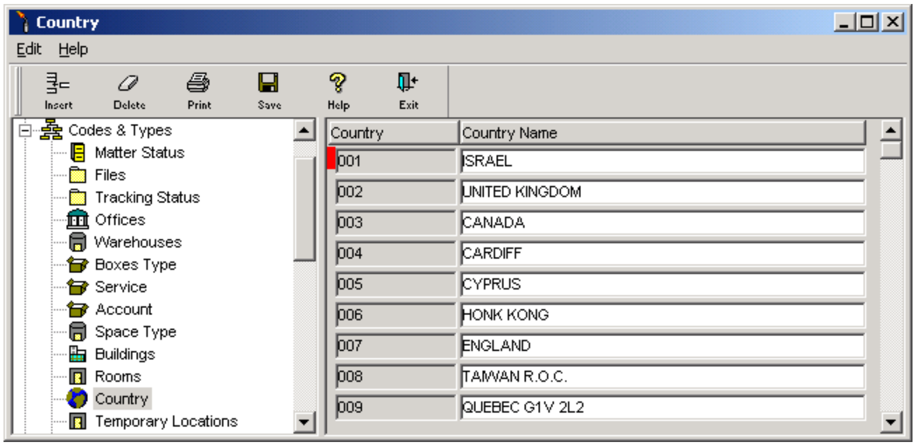

Figure 3-12 Country Codes

You may add new or edit existing ***Country*** descriptions either in the main program or here. ***Country*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Country Codes

The procedure for adding a new ***Country*** description is as follows:

- Expand Codes and Types
- Click the *Country* icon
- Click the Insert icon
- Enter a unique ID (up to 8 alphanumeric characters) for the Country in the *Country ID* data field.
- Tab to the *Country Name* data field and enter a descriptive name
- Click the ***Save*** icon to save your work.

Editing Country Codes

The ***Country ID*** data field is read-only and cannot be modified. The procedure for editing the ***Country Name*** data fields is as follows:

- Expand Codes and Types
- Click the *Country* icon
- Click anywhere in the *Country Name* data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Country Codes

You cannot delete a ***Country*** code that is in use. The procedure for deleting a ***Country*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Country* icon
- Click on the Code data field of the Country to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Country codes that are not in use in the Administration program. If an "in use" Country code is selected for deletion, FileSurf will display the following warning: "You still have this Classification assigned to [number of] Matters". To delete this Country code, you will first need to substitute a different Country code on all Matters using this Country then, retry the deletion.*

Temporary Location Codes

The ***Temporary Location*** codes screen, depicted in Figure 3-12, is used to define and maintain the list of ***Temporary Locations. Temporary Locations*** are "staging areas" where:

- New files are stored until they are shelved in their Home Room
- Files that are being returned from Check-Out are processed before being re-shelved; or
- Files being returned are temporarily held if they are on a wait list for another request.

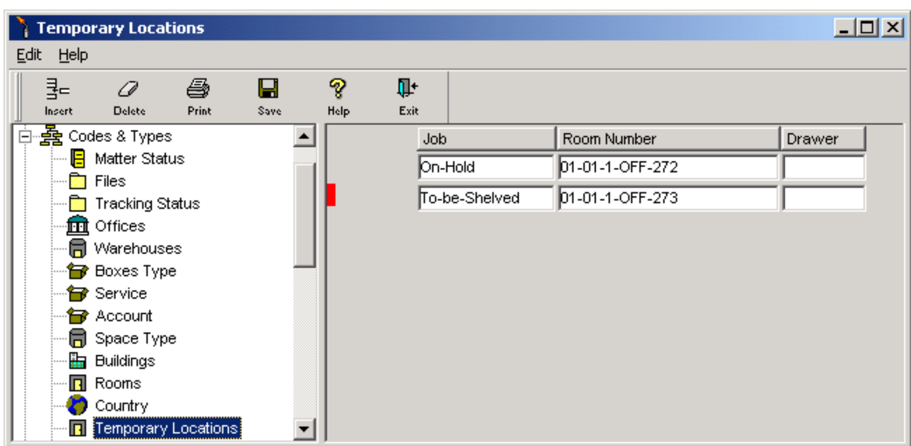

Figure 3-13 Temporary Location Codes

There are no limits to the number of ***Temporary Locations*** that can be added to the list. You may add new or edit existing ***Temporary Location*** descriptions either in the main program or here. ***Temporary Location*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Temporary Location Codes

The procedure for adding a new ***Temporary Location*** is as follows:

- Expand Codes and Types
- Click the *Temporary Location*s icon
- Click the Insert icon
- Click anywhere in the *Job* data field to display the Job options
- Select *On-Hold* or *To be Shelved*
- Click anywhere in the *Room Number* data field to display the Room Number pick list
- Select the room number for the location from the Room Number pick list
- Click anywhere in the *Drawer* data field and enter a descriptive name of the drawer or shelf
- Click the ***Save*** icon to save your work.

Editing Temporary Locations

The procedure for editing all other ***Temporary Location*** data fields is as follows:

- Expand Codes and Types
- Click the *Temporary Locations* icon
- Click anywhere in the desired data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Temporary Location

You cannot delete a ***Temporary Location Code*** that is in use. The procedure for deleting a ***Temporary Location Code*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Temporary Locations* icon
- Click on the Job data field of the Temporary Location to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Temporary Locations that are not in use in the Administration program. If an "in use" Temporary Location is selected for deletion, FileSurf will display the following warning: "You still have [number of] Folders assigned to this Location". To delete this Temporary Location, you will first need to substitute a different Location on all Folders using this Temporary Location then, retry the deletion.*

Assignees

The ***Assignees*** codes and types screen, depicted in Figure 3-14, is used to define and maintain the list of ***Assignee Types. Assignees*** (Matter level) and ***Designees*** (Client level) are employees in your organization that have specific roles or responsibilities with a Client or Matter. There are no limits to the number of ***Assignee Types*** that can be added to the list.

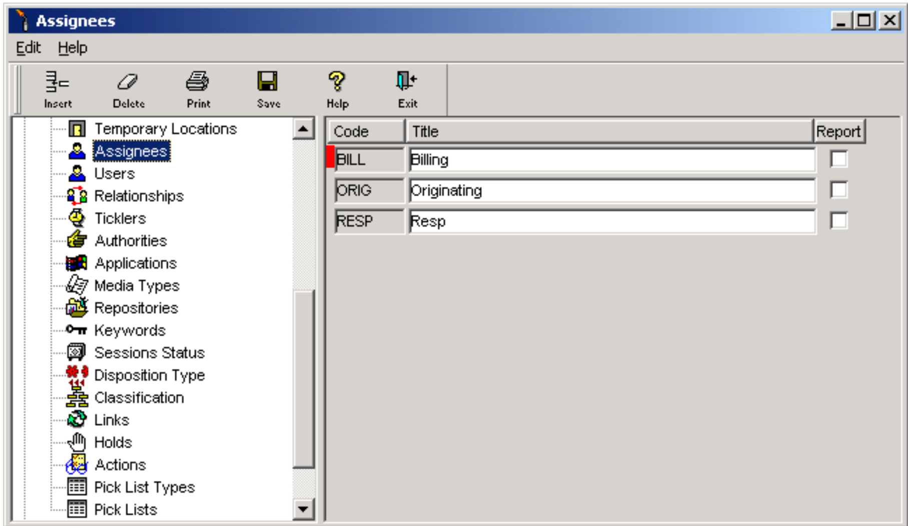

Figure 3-14 Assignee Codes and Types

You may add new or edit existing ***Assignee Type*** descriptions either in the main program or here. ***Assignee Type*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Assignee Types

The procedure for adding a new ***Assignee Type*** description is as follows:

- Expand Codes and Types
- Click the *Assignees* icon
- Click the Insert icon
- Enter a unique short name (up to 4 alphanumeric characters) for the Assignee Type in the *Code* data field
- Tab to the *Title* data field and enter a descriptive name of the Assignee Type
- Click the *Report* check box to configure FileSurf to automatically route retention reports regarding the Client's or Matter's files
- Click the ***Save*** icon to save your work.

Editing Assignee Types

All of the ***Assignee*** data fields may be modified except for the ***Code*** data field. The procedure for editing all other ***Assignee*** data fields is as follows:

- Expand Codes and Types
- Click the *Assignee* icon
- Click anywhere in the desired data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Assignee Types

You cannot delete an ***Assignee Type*** that is in use. The procedure for deleting an ***Assignee Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Assignee* icon
- Click on the Code data field of the Assignee to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Assignee Types that are not in use in the Administration program. If an "in use" Assignee Type is selected for deletion, FileSurf will display the following warning: "You still have [number of] Assignees of this type". To delete this Assignee type, you will first need to substitute a different Assignee Type on all Matters using this type then, retry the deletion.*

Users

The ***Users*** codes and types screen, depicted in Figure 3-15, is used to define and maintain the list of ***User*** *or* ***Employee Types. User Types*** are used to describe a User's functional role in the organization such as Records Manager, Associate, Secretary, etc. There are no limits to the number of ***User Types*** that can be added to the list.

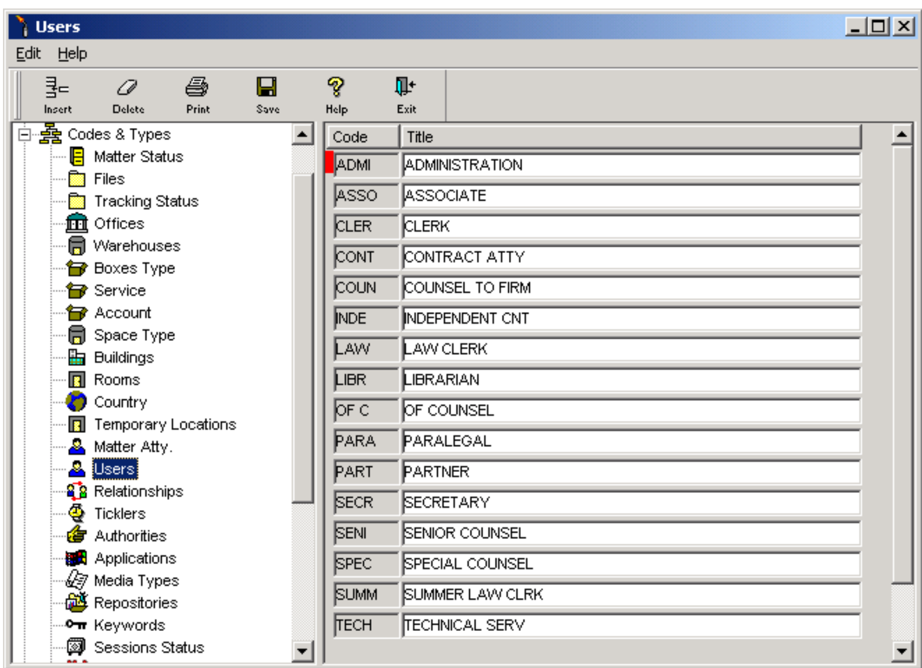

Figure 3-15 User Codes and Types

You may add new or edit existing ***User Type*** descriptions either in the main program or here. ***User Type*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding User Types

The procedure for adding a new ***User Type*** description is as follows:

- Expand Codes and Types
- Click the *User* icon
- Click the Insert icon
- Enter a unique short name (up to 4 alphanumeric characters) for the User Type in the *Code* data field
- Tab to the *Title* data field and enter a descriptive name of the User Type
- Click the ***Save*** icon to save your work.

Editing User Types

The ***User Code*** data field is read-only and cannot be modified. The procedure for editing the ***Title*** data fields is as follows:

- Expand Codes and Types
- Click the *User* icon
- Click anywhere in the *Title* the data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting User Types

You cannot delete a ***User Type*** that is in use. The procedure for deleting a ***User Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *User* icon
- Click on the Code data field of the User to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete User types that are not in use in the Administration program. If an "in use" User type is selected for deletion, FileSurf will display the following warning: "You still have this type assigned to [number of] Users". To delete this User type, you will first need to substitute a different User type on all Users using this type then, retry the deletion.*

Relationships

The ***Relationships*** codes and types screen, depicted in Figure 3-16, is used to define and maintain the list of ***Relationship Types.*** ***Relationship Types*** are used to describe the role or function of a Related Party (*e.g.,* Adverse Party, Plaintiff, Subsidiary, etc.). There are no limits to the number of ***Relationships Types*** that can be added to the list.

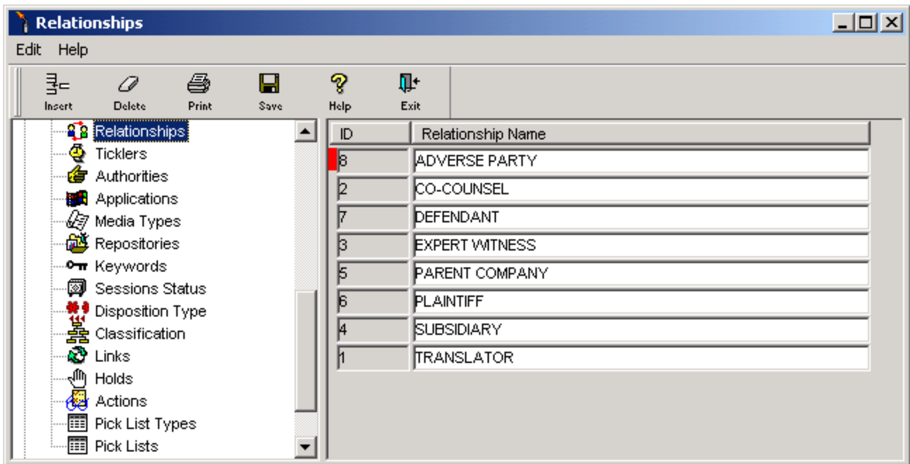

Figure 3-16 Relationships Codes and Types

You may add new or edit existing ***Relationship Type*** descriptions either in the main program or here. ***Relationships Type*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Relationship Types

The procedure for adding a new ***Relationships Type*** description is as follows:

- Expand Codes and Types
- Click the *Relationships* icon
- Click the Insert icon
- Enter a descriptive name in the *Relationship Name* data field
- FileSurf will automatically assign a unique ID for the Relationship
- Click the ***Save*** icon to save your work.

Editing Relationship Types

The ***Relationship ID*** data field is read-only and cannot be modified. The procedure for editing the ***Relationship Name*** data fields is as follows:

- Expand Codes and Types
- Click the *Relationships* icon
- Click anywhere in the Relationship Name data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Relationship Types

You cannot delete a ***Relationship Type*** that is in use. The procedure for deleting a ***Relationship Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Relationships* icon
- Click on the *ID* data field of the Relationship to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

> ***Note**: You can only delete Relationship types that are not in use in the Administration program. If an "in use" Relationship type is selected for deletion, FileSurf will display the following warning: "This Relationship is still in use [number of] times". To delete this Relationship type, you will first need to substitute a different Relationship type on all Clients, Matters, Users or Parties using this type then, retry the deletion.*

Ticklers

The ***Ticklers*** codes and types screen, depicted in Figure 3-17, is used to define and maintain the list of ***Tickler Types. Tickler Types*** are used to describe a typical action that a User may be responsible for regarding a Client, Matter or Folder (*e.g.*, Review, Court Date, Waiver Letter, etc.) There are no limits to the number of ***Tickler Types*** that can be added to the list.

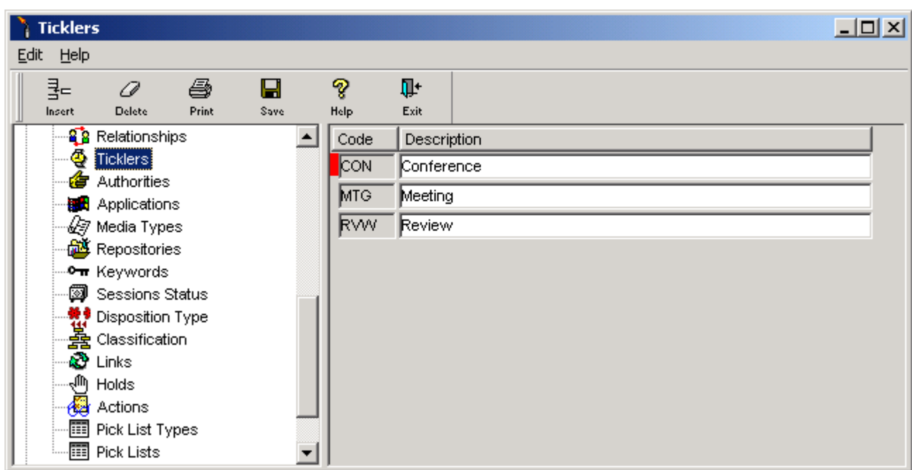

Figure 3-17 Tickler Codes and Types

You may add new or edit existing ***Tickler Type*** descriptions either in the main program or here. ***Tickler Type*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Tickler Types

The procedure for adding a new ***Tickler Type*** description is as follows:

- Expand Codes and Types
- Click the *Tickler* icon

- Click the Insert icon
- Enter a unique short name (up to 3 alphanumeric characters) for the Tickler Type in the Code data field.
- Tab to the *Description* data field and enter a descriptive name of the Tickler Type
- Click the ***Save*** icon to save your work.

Editing Tickler Types

The ***Tickler*** code data field is read-only and cannot be modified. The procedure for editing the ***Tickler*** Description data fields is as follows:

- Expand Codes and Types
- Click the *Tickler* icon
- Click anywhere in the *Description* data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Tickler Types

You cannot delete a ***Tickler Type*** that is in use. The procedure for deleting a ***Tickler Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the ***Tickler*** icon
- Click on the Code data field of the Tickler to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete Tickler types that are not in use in the Administration program. If an "in use" Tickler type is selected for deletion, FileSurf will display the following warning: "You still have this status assigned to [number of] Ticklers". To delete this Tickler type, you will first need to substitute a different Tickler type on all Clients, Matters and Folders using this type then, retry the deletion.*

Authorities

The ***Authorities*** codes screen, depicted in Figure 3-18, is used to define and maintain the list of ***Authority Names. Authority Names*** are used to enter citations of the regulation or policy that prescribes the retention for the subject categories and files. There are no limits to the number of ***Authority Names*** that can be added to the list.

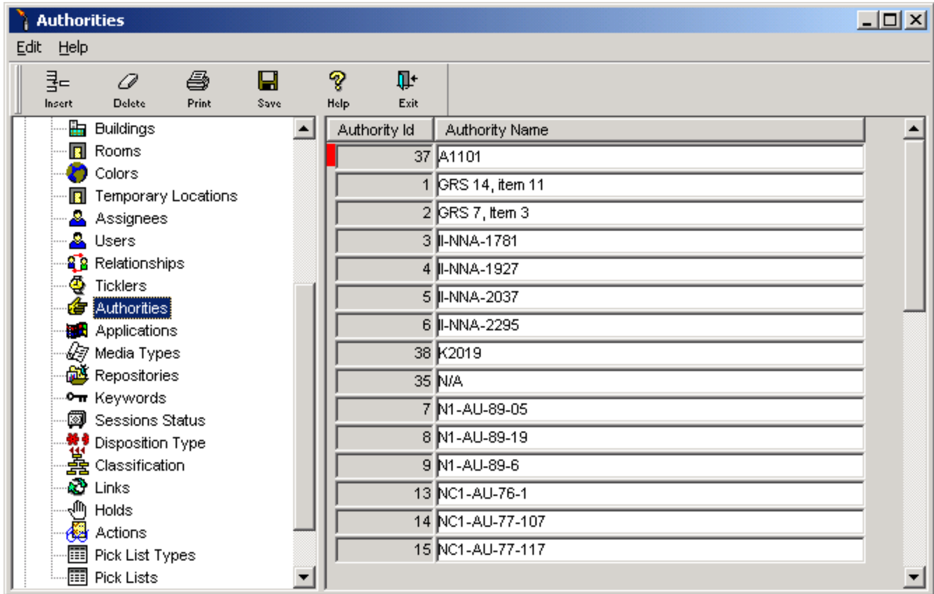

Figure 3-18 Authority Codes

You may add new or edit existing ***Authority*** descriptions either in the main program or here. ***Authority*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Authorities

The procedure for adding a new ***Authority*** description is as follows:

- Expand Codes and Types
- Click the *Authorities* icon
- Click the Insert icon
- Enter a descriptive name in the Authority Name data field
- FileSurf will automatically assign a unique Authority ID
- Click the ***Save*** icon to save your work.

Editing Authorities

The ***Authority ID*** data field is read-only and cannot be modified. The procedure for editing the ***Authority Name*** data fields is as follows:

- Expand Codes and Types
- Click the *Authorities* icon
- Click anywhere in the Authority Name data field to select all text
- Make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Authorities

You cannot delete an ***Authority*** that is in use. The procedure for deleting an ***Authority*** that is not in use is as follows:

- Expand Codes and Types

- Click the *Authorities* icon
- Click on the ID data field of the Authority to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

> ***Note**: You can only delete an Authority that is not in use in the Administration program. If an "in use" Authority is selected for deletion, FileSurf will display the following warning: "You still have this Authority assigned to [number of] Folders". To delete this Authority, you will first need to substitute an Authority on all Folders using this Authority then, retry the deletion.*

Applications

The ***Applications*** codes and types screen, depicted in Figure 3-19, is used to define and maintain the list of Applications that were commonly used to generate electronic documents in your organization or by your customers and contacts. The Applications pick list is displayed on the Document Profile Form in the main program. There are no limits to the number of ***Applications*** that can be added to the list.

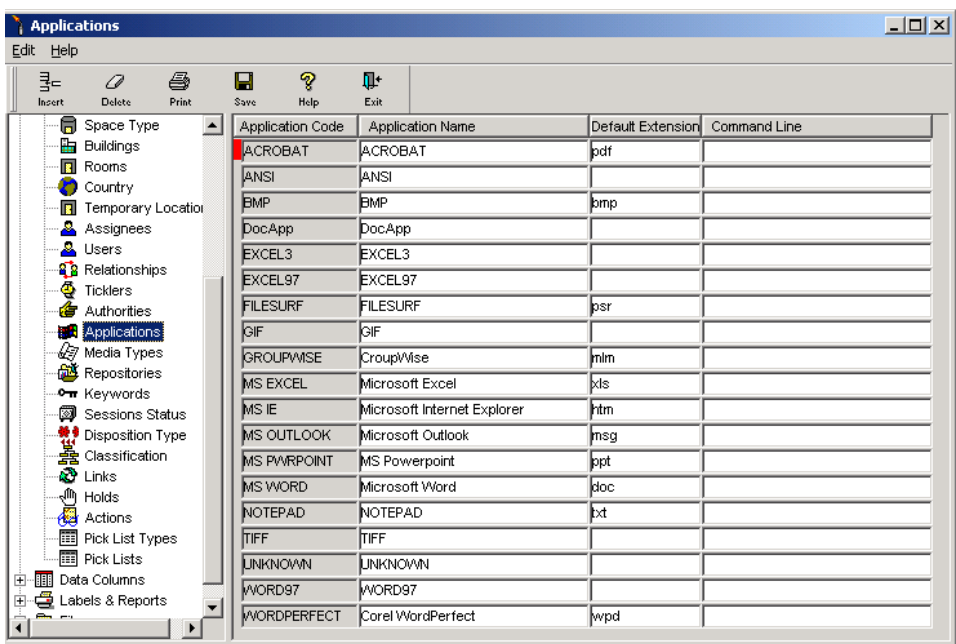

Figure 3-19 Application Codes

You may add new or edit existing ***Application*** descriptions either in the main program or here. ***Application*** descriptions can only be deleted via the Administrator program – not in the main application.

Adding Application Codes

The procedure for adding a new ***Application*** description is as follows:

- Expand Codes and Types

- Click the *Applications* icon
- Click the Insert icon
- Enter a unique short name (up to 25 alphanumeric characters) for the Application in the *Application Code* data field
- Tab to the *Title* data field and enter a descriptive name
- Tab to the *Default Extension* data field the Enter the Application's default extension
- Tab to the *Command Line* data field and enter the path used to launch the Application
- Click the ***Save*** icon to save your work.

Editing Application Codes

All of the ***Applications*** data fields may be modified except for the ***Code*** data field. The procedure for editing ***Application*** descriptions is as follows:

- Expand Codes and Types
- Click the *Applications* icon
- Click anywhere in the desired data field of the entry to be modified and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Application Codes

You cannot delete an ***Application*** code that is in use. The procedure for deleting an ***Application*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Applications* icon
- Click on the Code data field of the status description to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete Application codes that are not in use in the Administration program. If an "in use" Application code is selected for deletion, FileSurf will display the following warning: "You still have this Application assigned to [number of] Documents". To delete this Application code, you will first need to substitute a different Application code on all Documents using this code then, retry the deletion.*

Media Types

The ***Media Types*** codes screen, depicted in Figure 3-20, is used to define and maintain the list of ***Media Types. Media Types*** are used to describe the media of records that are stored outside of your organization's electronic record repository (*e.g.,* Paper, Floppy Disks, Magnetic Tape, etc.) There are no limits to the number of ***Media Types*** that can be added to the list.

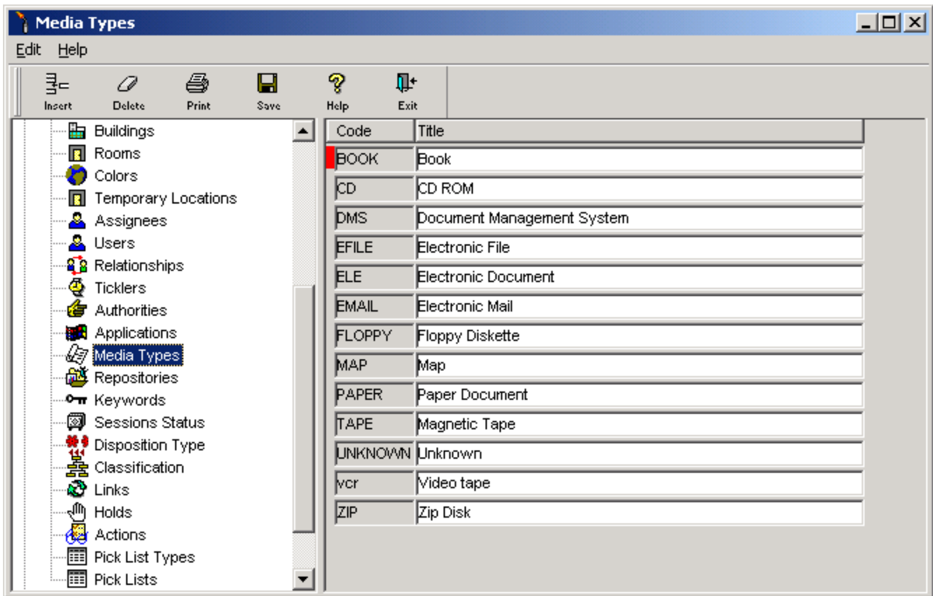

Figure 3-20 Media Codes and Types

You may add new or edit existing ***Media Types*** either in the main program or here. ***Media Types*** can only be deleted via the Administrator program – not in the main application.

Adding Media Types

The procedure for adding new ***Media Types*** is as follows:

- Expand Codes and Types
- Click the *Media Types* icon
- Click the Insert icon
- Enter a unique short name (up to 8 alphanumeric characters) for the Media in the *Code* data field
- Tab to the *Title* data field and enter a descriptive name of the Media
- Click the ***Save*** icon to save your work.

Editing Media Types

The ***Media Code*** data field is read-only and cannot be modified. The procedure for editing ***Media Title*** data fields is as follows:

- Expand Codes and Types

- Click the *Media Types* icon
- Click anywhere in the *Title* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Media Types

You cannot delete a ***Media Type*** that is in use. The procedure for deleting a ***Media Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Media Types* icon
- Click on the Code data field of the Media to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Media types that are not in use in the Administration program. If an "in use" Media type is selected for deletion, FileSurf will display the following warning: "You still have this Media type assigned to [number of] Documents". To delete this Media type, you will first need to substitute a different Media type on all Documents using this type then, retry the deletion.*

Repositories

The ***Repository*** screen, depicted in Figure 3-21, is used to define and maintain the list of document repositories where active records in electronic format will be stored. There are no limits to the number of ***Repositories*** that can be added to the list.

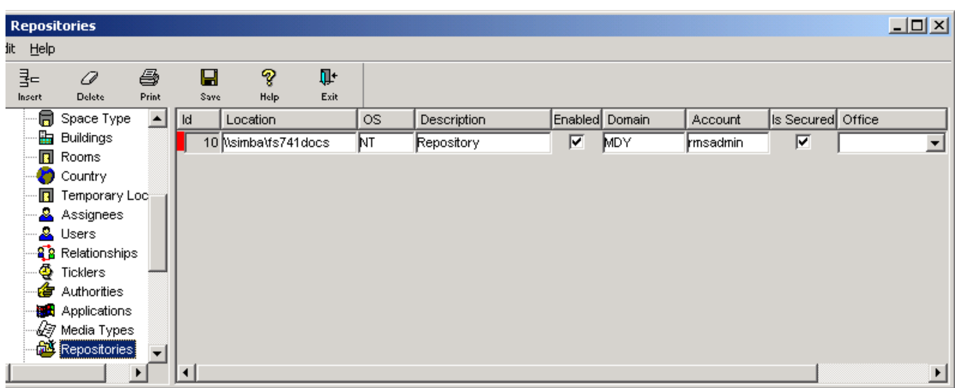

Figure 3-21 Repositories Codes and Types

You may add new or edit existing ***Repositories*** either in the main program or here. A ***Repository*** can only be deleted via the Administrator program – not in the main application.

Adding Repositories

The procedure for adding new ***Repositories*** is as follows:

- Expand Codes and Types

- Click the *Repositories* icon
- Click the Insert icon
- Enter the directory path of the Repository in the *Location* data field
- FileSurf will automatically assign an internal ID code for the repository
- Tab to the *OS* data field and enter the name of the server operating system
- Tab to the *Description* data field and enter a descriptive name of the repository
- The *Enabled* check box is reserved for future use
- The Domain data field is reserved for future use
- The Account data field is reserved for future use
- The Is Secured check box is reserved for future use
- The Office data field is reserved for future use
- Click the ***Save*** icon to save your work.

Editing Repositories

All of the ***Repository*** data fields may be modified except for the ***Code*** data field. The procedure for editing all other ***Repository*** data fields is as follows:

- Expand Codes and Types
- Click the *Repositories* icon
- Click anywhere in the desired data field to select all text then, make the necessary modifications
- Click the ***Save*** icon to save your work.

Keywords

The ***Keywords*** codes screen, depicted in Figure 3-20, is used to define and maintain the list of ***Keywords.*** ***Keywords*** are indexed and used when searching Document content in the main application. ***Keywords*** may be entered on a Document Profile results found on Document Profile (paper documents) results found in Document Contents (electronic documents). The Keywords pick list is displayed on the Document Form in the main application. There are no limits to the number of ***Keywords*** that can be added to the list.

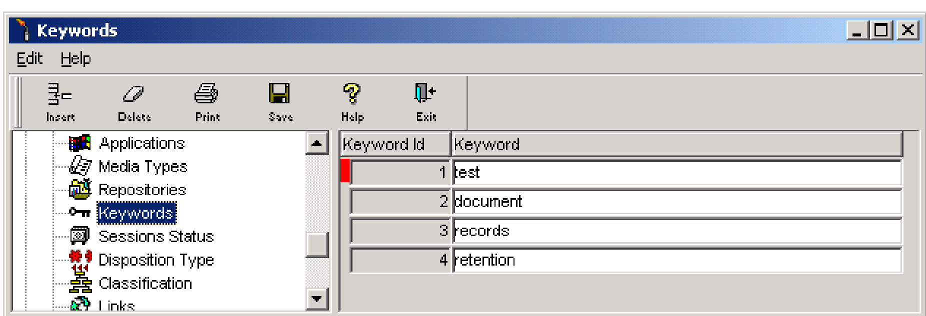

Figure 3-22 Keywords Codes and Types

You may add new or edit existing ***Keywords*** either in the main program or here. ***Keywords*** can only be deleted via the Administrator program – not in the main application.

Adding Keywords

The procedure for adding new ***Keywords*** is as follows:

- Expand Codes and Types
- Click the *Keywords* icon
- Click the Insert icon
- Enter a Keyword in the *Keyword* data field
- FileSurf will automatically assign a unique internal *Keyword ID*
- Click the ***Save*** icon to save your work.

Editing Keywords

The ***Keyword ID*** data field is read-only and cannot be modified. The procedure for editing ***Keyword*** data fields is as follows:

- Expand Codes and Types
- Click the *Keywords* icon
- Click anywhere in the *Keyword* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Keywords

You cannot delete a ***Keyword*** that is in use. The procedure for deleting a ***Keyword*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Keywords* icon
- Click on the ID data field of the Keyword to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Media types that are not in use in the Administration program. If an "in use" Media type is selected for deletion, FileSurf will display the following warning: "This Keyword is still in use [number of] times". To delete this Keyword, you will first need to substitute a different Keyword on all Documents using this Keyword then, retry the deletion.*

Session Status

The ***Sessions status*** codes screen, depicted in Figure 3-23, is used to define and maintain the list of ***Sessions status. Session statuses*** are used to describe the status of a Session. The Sessions Status pick list is displayed on the Sessions Form in the main application. There are no limits to the number of ***Sessions status*** that can be added to the list.

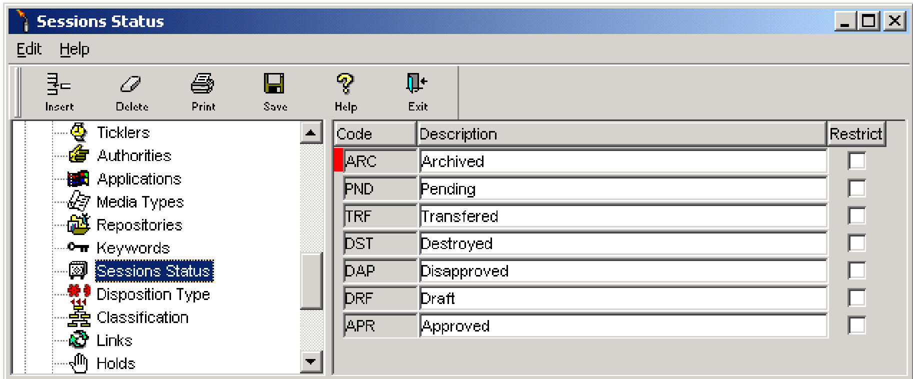

Figure 3-23 Session Status Codes and Types

You may add new or edit existing ***Sessions status*** either in the main program or here. ***Sessions status*** can only be deleted via the Administrator program – not in the main application.

Adding Sessions status codes

The procedure for adding new ***Sessions status*** is as follows:

- Expand Codes and Types
- Click the *Sessions Status* icon
- Click the Insert icon
- Enter a unique short name (up to 3 alphanumeric characters) for the Session Status in the *Description* data field
- *Restrict* checkbox (reserved for future use)
- Click the ***Save*** icon to save your work.

Editing Sessions status

The ***Sessions Status Code*** data field is read-only and cannot be modified. The procedure for editing ***Description*** data fields is as follows:

- Expand Codes and Types
- Click the *Sessions status* icon
- Click anywhere in the *Description* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Sessions status

You cannot delete a ***Sessions Status*** code that is in use. The procedure for deleting a ***Session Status*** code that is not in use is as follows:

- Expand Codes and Types
- Click the *Sessions status* icon
- Click on the Code data field of the Sessions Status to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Sessions Status codes that are not in use in the Administration program. If an "in use" status code is selected for deletion, FileSurf will display the following warning: "You still have this Status assigned to [number of] Sessions". To delete this Status code, you will first need to substitute a different Status code on all Sessions using this Status then, retry the deletion.*

Disposition Type

The ***Disposition Type*** codes screen, depicted in **Error! Reference source not found.**, is used to define and maintain the list of Disposition Types. The Disposition Types pick list is displayed on the Disposition menu in the main program.

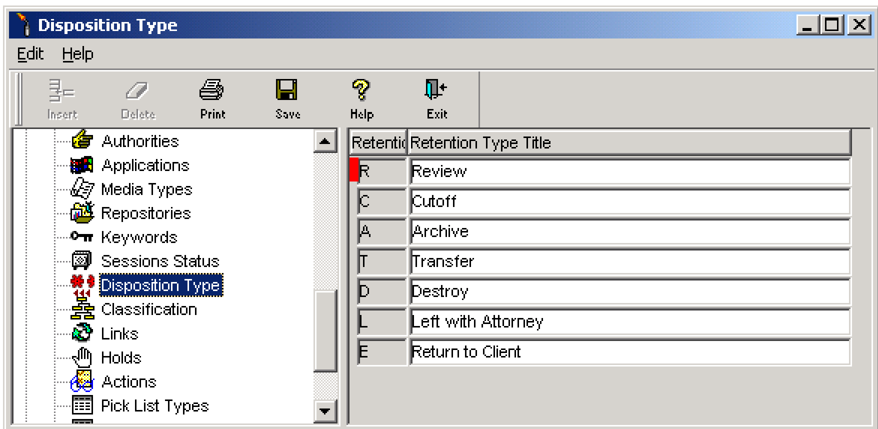

Figure 3-24 Disposition Codes and Types

The list of Disposition Types descriptions is hard-coded in the database and cannot be modified or removed. You may modify the *Description* of existing Disposition Types to make them more meaningful to your organization.

Editing Disposition Types

The procedure for editing the Disposition Type description data fields is as follows:

- Expand Codes and Types
- Click the ***Disposition Types*** icon
- Click anywhere in the *Description* data field to select all text, then make the necessary modifications
- Click the ***Save*** icon to save your work.

Classifications

The ***Classifications*** codes screen, depicted in Figure 3-25, is used to define and maintain the list of ***Classifications.*** ***Classifications*** are security clearance levels assigned to User accounts, which provide additional User access controls to FileSurf objects. ***Classifications*** may be combined with Ethical Wall security and Supplemental Markings. The ***Classifications*** pick list is displayed on numerous Forms in the main application. There are no limits to the number of ***Classifications*** that can be added to the list.

You may add new or edit existing ***Classifications*** either in the main program or here. ***Classifications*** can only be deleted via the Administrator program – not in the main application.

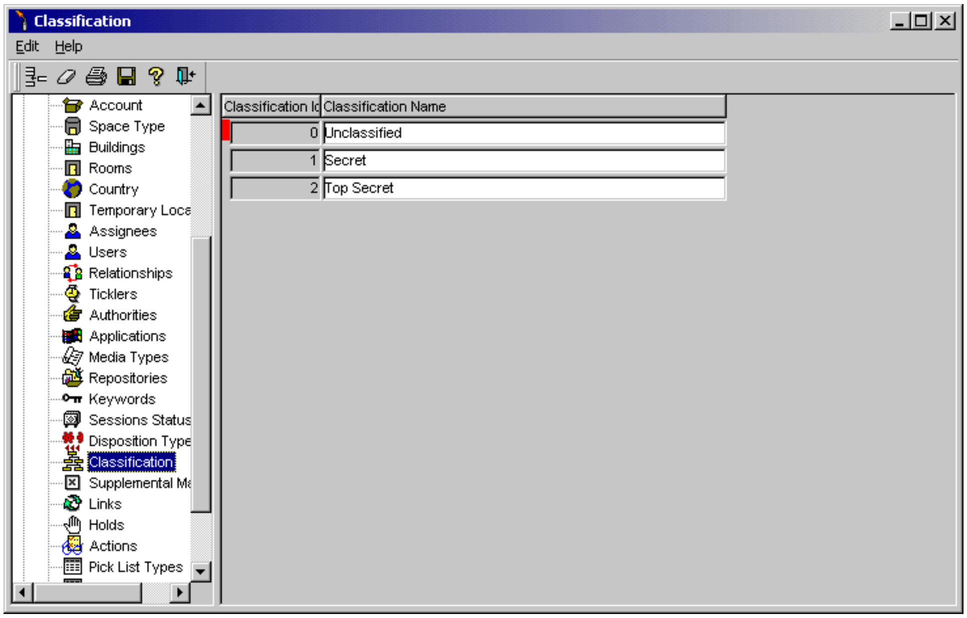

Figure 3-25 Classification Codes and Types

Adding Classifications

The procedure for adding new ***Classifications*** is as follows:

- Expand Codes and Types
- Click the *Classifications* icon
- Click the Insert icon
- Enter a security level (numeric) in the *Classification ID* data field.

Tip: *The Classification ID dictates the level of security; zero being equal to "Unclassified" and the highest numeric value being equal to the highest classification level. When defining Classifications, Users are granted access to objects assigned to commensurate classification levels and below. For example, Users granted access to objects with a Classification ID of 5 are granted access to objects with Classification IDs of 0 through 4 as well.*

- Enter a name in the *Classification Name* data field
- Click the ***Save*** icon to save your work.

Editing Classifications

The ***Classification ID*** data field is read-only and cannot be modified. The procedure for editing the ***Classification Name*** data fields is as follows:

- Expand Codes and Types
- Click the *Classifications* icon
- Click anywhere in the *Classification* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Classifications

You cannot delete a ***Classification*** that is in use. The procedure for deleting a ***Classification*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Classifications* icon
- Click on the ID data field of the Classification to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

Note: *You can only delete Classification types that are not in use in the Administration program. If an "in use" Classification type is selected for deletion, FileSurf will display the following warning: "You still have this Classification assigned to [number of] Boxes". To delete this Classification, you will first need to substitute a different Classification on all objects using this Classification then, retry the deletion.*

Supplemental Markings

The ***Supplemental Markings*** codes screen, depicted in Figure 3-26, is used to define and maintain the list of ***Supplemental Markings. Supplemental Markings*** provide a third layer of security when used in conjunction with Classifications. The Supplemental Markings pick list is displayed on numerous Forms in the main application. There are no limits to the number of ***Supplemental Markings*** that can be added to the list.

You may add new or edit existing ***Supplemental Markings*** either in the main program or here. ***Supplemental Markings*** can only be deleted via the Administrator program – not in the main application.

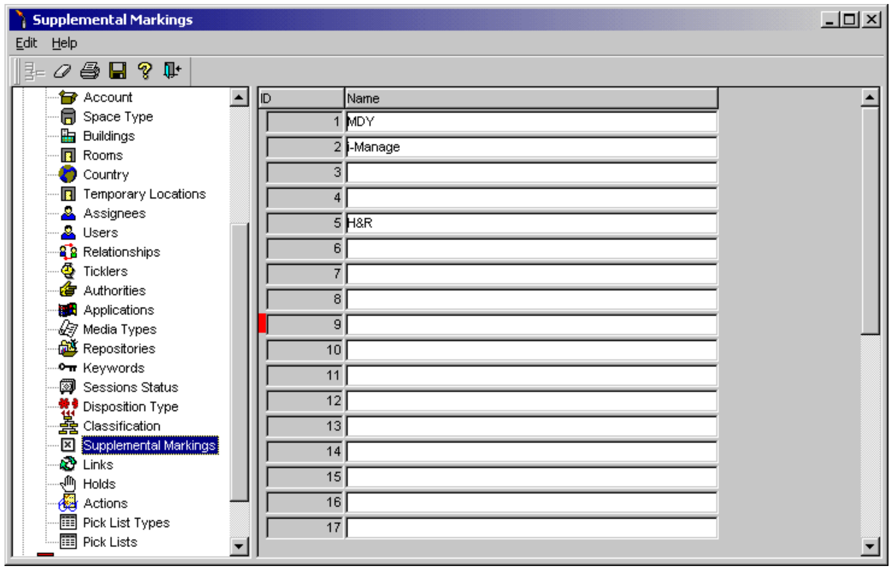

Figure 3-26 Supplemental Markings Codes and Types

Define Supplemental Markings

FileSurf allows up to 32 ***Supplemental Markings***. You may not add to or delete Supplement Markings from this list. To define a ***Supplemental Marking***:

- Expand Codes and Types
- Click the *Supplemental Markings* icon
- Enter a unique name in the desired ***Name*** field
- Click the ***Save*** icon to save your work.

Editing Supplemental Markings

The ***Supplemental Marking ID*** data field is read-only and cannot be modified. The procedure for editing the ***Name*** data fields is as follows:

- Expand Codes and Types
- Click the *Supplemental Markings* icon
- Click anywhere in the *Name* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Links

The ***Links*** codes and types screen, depicted in Figure 3-27, is used to define and maintain the list of relationships that describe the purpose for the linking one

FileSurf object to another. Links may be bi-directional or uni-directional. There are no limits to the number of ***Link*** types that can be added to the list.

You may add new or edit existing ***Link*** types either in the main program or here. A ***Link*** type can only be deleted via the Administrator program – not in the main application.

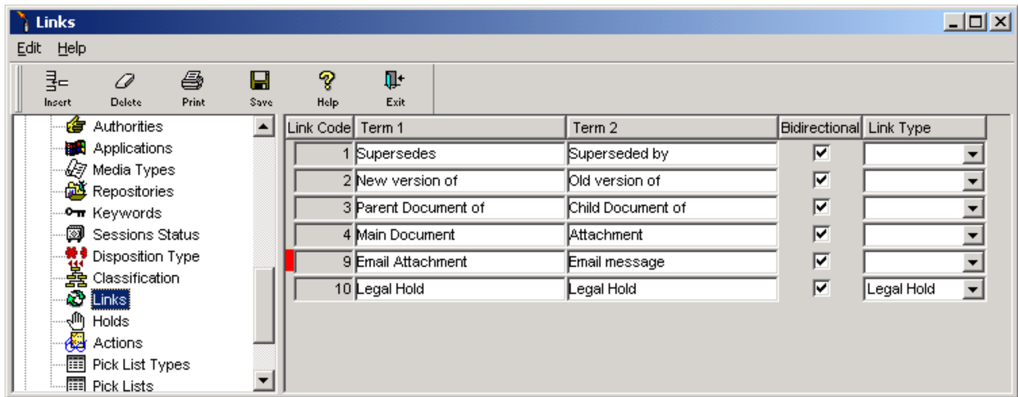

Figure 3-27 Link Codes and Types

Adding Link Types

The procedure for adding new ***Link*** types is as follows:

- Expand Codes and Types
- Click the *Links* icon
- Click the Insert icon
- Enter the relationship of the first object (Linked From) in the *Term 1* data field (*e.g.,* Supercedes)
- FileSurf will automatically assign an internal code for the Link Type
- Tab to the *Term 2* data field (Linked To) and enter the relationship of the second object (*e.g.,* Superceded by)
- Tab to the *Bi-Directional* checkbox to view Link from either object (uni-directional Links can only be viewed from the *Link From* object)
- Tab to *Link Type* data field; click anywhere in the data field to display the Link Type pick list and select the desired Link Type
- Click the ***Save*** icon to save your work.

Editing Link Types

All of the ***Links*** data fields may be modified except for the ***Code*** data field. The procedure for editing all other ***Link*** type data fields is as follows:

- Expand Codes and Types
- Click the *Links* icon
- Click anywhere on the desired data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work

Deleting Link Types

You cannot delete a ***Link Type*** that is in use. The procedure for deleting a ***Link Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Link* icon
- Click on the ID data field of the Link Type to be deleted
- Click the Delete icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Link types that are not in use in the Administration program. If an "in use" Link type is selected for deletion, FileSurf will display the following warning: "This Link type is still in use [number of] times". To delete this Link type, you will first need to substitute a different Link type on all FileSurf objects using this type then, retry the deletion.*

Holds

The ***Holds*** codes and types screen, depicted in Figure 3-28, is used to define and maintain the list of ***Holds***. ***Holds*** are used to identify records affected by investigations or audits and "freeze" any disposition action for which they might be candidates until the ***Hold*** has been released. There are no limits to the number of ***Holds*** that can be added to the list.

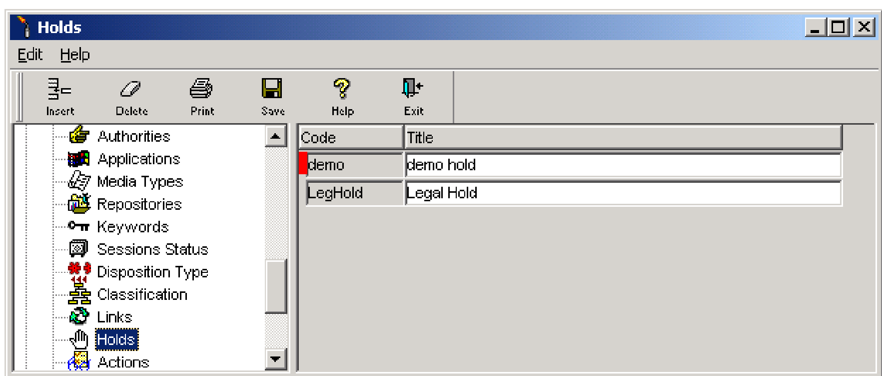

Figure 3-28 Holds

Adding Holds Codes

The procedure for adding a ***Hold*** code is as follows:

- Expand Codes and Types
- Click the *Holds* icon
- Enter a unique short name (up to 8 alphanumeric characters) for the Hold in the *Code* data field (mandatory)
- Tab to the *Title* data field and enter a descriptive name
- Click the ***Save*** icon to save your work.

Editing Hold Types

The ***Holds Code*** data field is read-only and cannot be modified. The procedure for editing the ***Title*** data field is as follows:

- Expand Codes and Types
- Click the *Holds* icon
- Click anywhere in the *Title* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work

Deleting Holds

You cannot delete a ***Hold*** type that is in use. The procedure for deleting a ***Hold*** type that is not in use is as follows:

- Expand Codes and Types
- Click the *Holds* icon
- Click on the Code data field of the Hold type to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

***Note**: You can only delete Hold types that are not in use in the Administration program. If an "in use" Hold type is selected for deletion, FileSurf will display the following warning: "This type is assigned to [number of] Hold". To delete this Hold, you will first need to substitute a different Hold type on all records using this Hold type then, retry the deletion.*

Actions

The ***Actions*** codes and types screen, depicted in Figure 3-29, is used to specify the actions or activities that are to be captured in the Audit Log.

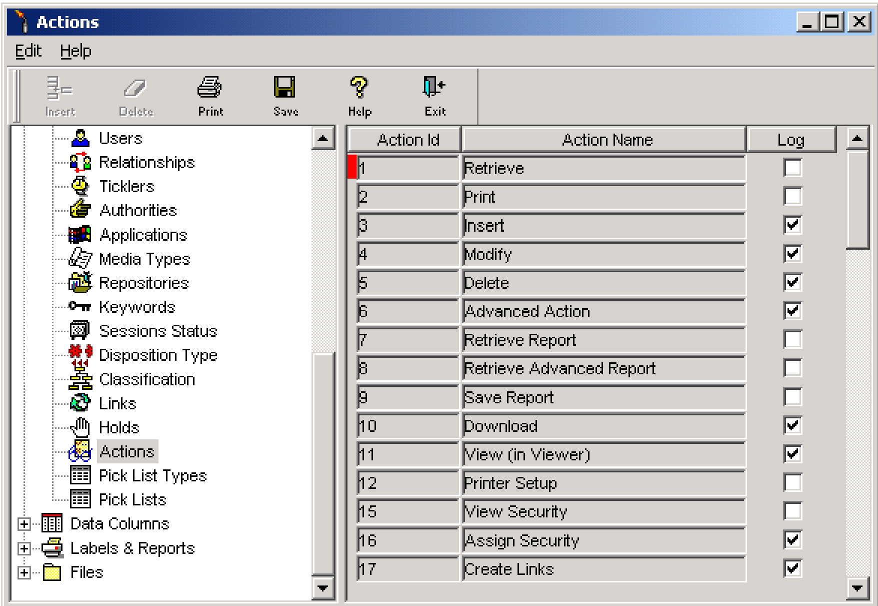

Figure 3-29 Actions

The list of ***Actions*** is hard-coded in the database and you cannot add or remove them from the list. You can only elect to capture or not to capture a specific Audit activity.

Selecting Actions

The procedure for selecting an audit ***Action*** is as follows:

- Expand Codes and Types
- Click the *Actions* icon
- Mark the *Log* check box if the action is to be logged or
- Unmark the Log check if the action is not to be logged
- Click the ***Save*** icon to save your work.

Pick List Types

The ***Pick List Types*** screen, depicted in Figure 3-30, is used to identify and maintain a list of custom ***Pick List Types***. The list of Pick List Types is only accessible in the Administrator Program. There are no limits to the number of ***Pick List Types*** that can be added to the list.

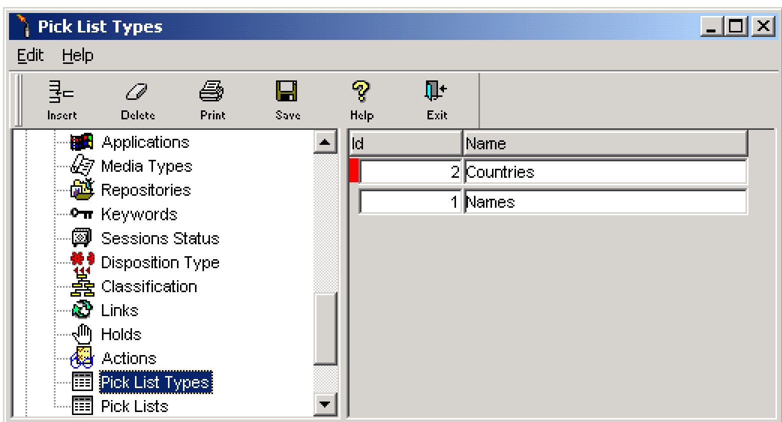

Figure 3-30 Pick List Types

Adding Pick List Types

The procedure for adding a ***Pick List Type*** is as follows:

- Expand Codes and Types
- Click the *Pick List Types* icon
- Click the Insert icon
- Enter a numeric value for the Pick List type in the *ID* data field
- Tab to the *Name* data field and enter a descriptive name (up to 30 alphanumeric characters) for the Pick List type
- Click the ***Save*** icon to save your work.

Editing Pick List Types

Each of the ***Pick List Types*** may be modified. The procedure for editing a ***Pick List Type*** data fields is as follows:

- Expand Codes and Types
- Click the *Pick List Types* icon
- Click anywhere in the *Title* data field to select all text and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Pick List Types

You cannot delete a ***Pick List Type*** that is in use. The procedure for deleting a ***Pick List Type*** that is not in use is as follows:

- Expand Codes and Types
- Click the *Pick List Types* icon
- Click on the Code data field of the Pick List to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

> ***Note***: *You can only delete Pick List types that are not in use in the Administration program. If an "in use" Pick List Type is selected for deletion, FileSurf will display the following warning: "This Pick List has [number of] items". To delete this Pick List type, you will first need to substitute a different Pick List Type on all custom Pick Lists using this type then, retry the deletion.*

Pick Lists

The ***Pick Lists*** screen, depicted in Figure 3-31, is used to populate the custom Pick Lists. Custom ***Pick Lists*** may be added to any of the FileSurf Forms. There are no limits to the number of entries that can be added to a custom Pick List.

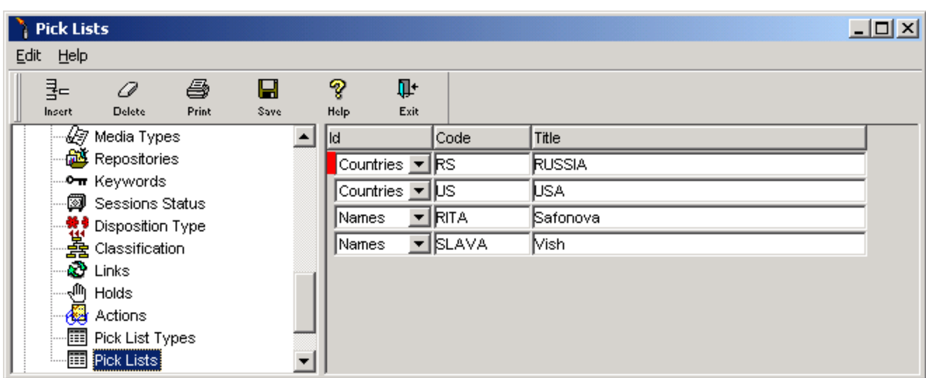

Figure 3-31 Pick Lists

Populate Custom Pick Lists

The procedure for customizing a custom ***Pick List*** is as follows:

- Expand Codes and Types
- Click the *Pick Lists* icon
- Click the Insert icon
- Click anywhere in the *ID* data field to display the custom Pick List Types
- Select the desired Pick List Type
- Tab to the *Code* data field and enter a descriptive name for the Pick List type
- Enter a unique short name (up to 10 alphanumeric characters) for the Pick List entry in the *Code* data field
- Tab to the *Title* data field and enter a descriptive name
- Click the ***Save*** icon to save your work.

Editing Pick List Entries

Each of the ***Pick List*** data fields may be modified. The procedure for editing a ***Pick List*** data field is as follows:

- Expand Codes and Types
- Click the *Pick List* icon
- Click anywhere in the desired data field and make the necessary modifications
- Click the ***Save*** icon to save your work.

Deleting Pick List Entries

You cannot delete a ***Pick List*** entry that is in use. The procedure for deleting a ***Pick List*** entry that is not in use is as follows:

- Expand Codes and Types
- Click the *Pick List* icon
- Click on the Code data field of the Pick List to be deleted
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

Adding Custom Pick Lists to Forms

Add to an Existing Data Field

- Expand Data Columns
- Select All Columns
- Click the *Label* column heading to sort the list by Label (data field) name
- Scroll across to the *Lookup Form* data field
- Enter "**d_pick_list**" (no quotation marks)
- Tab to the *Lookup Column* data field and enter the Pick List Type ID
- Click the ***Save*** icon to save your work.

Add to a New Data Field

- Expand Data Columns
- Select All Columns
- Click the Insert icon
- Unmark the *Write* check box to make this a read-only data field in the main application
- Enter the exact name of the FileSurf database table that this custom field will be added to in the *Table Name* column

- Enter a descriptive internal data base name for the custom field in the *Column Name* data field. (FileSurf will automatically assign an internal *Code* for the custom field.)
- Enter the label of the custom field in the *Label* column
- Select the appropriate format for the custom field from the *Column Type* pick list. Options are:
  - Number
  - Date/Time
  - String
  - Upper Case
  - Yes/No
- Select the appropriate data type for the custom field from the *DB Type* pick list. Options are:
  - Integer
  - Char(1) - enter appropriate field size
  - Varchar (30) – enter appropriate field size
  - Date/Time
  - Decimal(2) - enter appropriate field size
  - Float
- Tab to *Lookup Form* and e*nter* "**d_pick_list**" (no quotation marks)
- Tab to the *Lookup Column* data field and enter the Pick List Type ID
- Click the ***Save*** icon to save your work.

C H A P T E R 4

Data Columns

What you will learn in this chapter:

- How to customize the terminology used to label the FileSurf data fields as they appear globally throughout FileSurf
- How to configure default and custom Templates, Browse lists, Toolbars and Splash Screens
- How to configure which data fields will appear on User Configurable Reports
- How to configure default displays for all users, members of certain groups and for individual users

General

This chapter will show you how to customize the terminology used to label data fields as they appear throughout FileSurf. It also shows you how to configure the data fields that will appear on each form's template and browse screens, the order in which they appear and which fields are available for user configurable reports. You can configure default displays for all users, members of certain groups and for individual users.

All Columns Screen

The ***All Columns*** screen, depicted in Figure 4-1, is used to determine the look and behavior of data fields in the main application. You may configure a FileSurf data field:

- To be displayed or hidden in the main application;
- To be editable or read-only;
  OR
- You may add or remove custom fields.

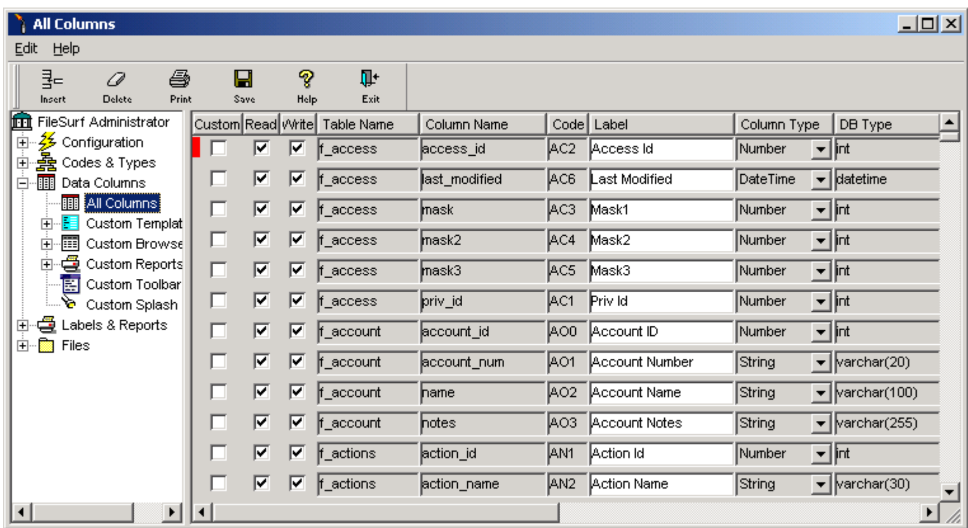

Figure 4-1 All Columns Screen

Configuring Existing Data Fields

The procedure for configuring existing data fields is as follows.

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Label*** column to sort the data fields in alphabetical order
- Unmark the ***Read*** checkbox on the desired data field to hide the data field in the main application
- Unmark the ***Write*** checkbox on the desired data field to make the data field "read-only" in the main application
- Click the ***Label*** column to enter the custom term to be displayed in the main application

- Mark the ***Required*** checkbox to make this a "mandatory" field during user data entry operations in the main application.
- Click the ***Save*** icon to save your work.

***Note**: You should **not** make any other changes to the existing data fields.*

Adding Custom Data Fields

The procedure for adding ***Custom*** data fields is as follows:

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Insert*** icon
- Unmark the ***Write*** checkbox to make the data field "read-only" in the main application
- Enter the exact name of the FileSurf database table this custom field will be added to in the ***Table Name*** column
- Enter a descriptive internal database name for the custom field in the ***Column Name*** data field. (FileSurf will automatically assign an internal ***Code*** for the custom field.)
- Enter a label for the custom field in the ***Label*** column
- Select the appropriate format for the custom field from the ***Column Type*** pick list Options are:
  - Number
  - Date/Time
  - String
  - Upper Case
  - Yes/No
- Select the appropriate data type for the custom field from the ***DB Type*** pick list. Options are:
  - Integer
  - Char(1) - enter appropriate field size
  - Varchar (30) – enter appropriate field size
  - Date/Time
  - Decimal(2) - enter appropriate field size
  - Float
- Enter the name of an existing FileSurf pick list, to display its data in this custom field, in the ***Lookup Form*** column
- Enter the Pick List Type ID in the ***Lookup Column***
- Mark the ***Required*** checkbox to mark this field as mandatory during user data entry operations in the main application
- Click the ***Save*** icon to save your work.

Deleting Data Fields

You cannot delete a ***Data Field*** that is in use. The procedure for deleting a ***Data Field*** that is not in use is as follows:

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Label*** column to sort the data fields in alphabetical order
- Click near the ***Custom*** check box of the desired data field to select the field
- Click the ***Delete*** icon
- Click the ***Save*** icon to save your work.

Custom Templates

The ***Custom Templates*** screen, depicted in Figure 4-2, serves three purposes. It is used to:

- List the data fields that can appear on at least one of the many FileSurf templates
- Customize the order in which specific fields will appear on the templates
- Insert additional data fields on a particular template

***Note**: FileSurf automatically adds custom data fields created via the All Columns screen to all appropriate Available Columns. For example, if you add a custom field to the f_contents table, the custom field will automatically be added to the Available Columns list for the Document Template, Document Browse and Document Configure Report screens.*

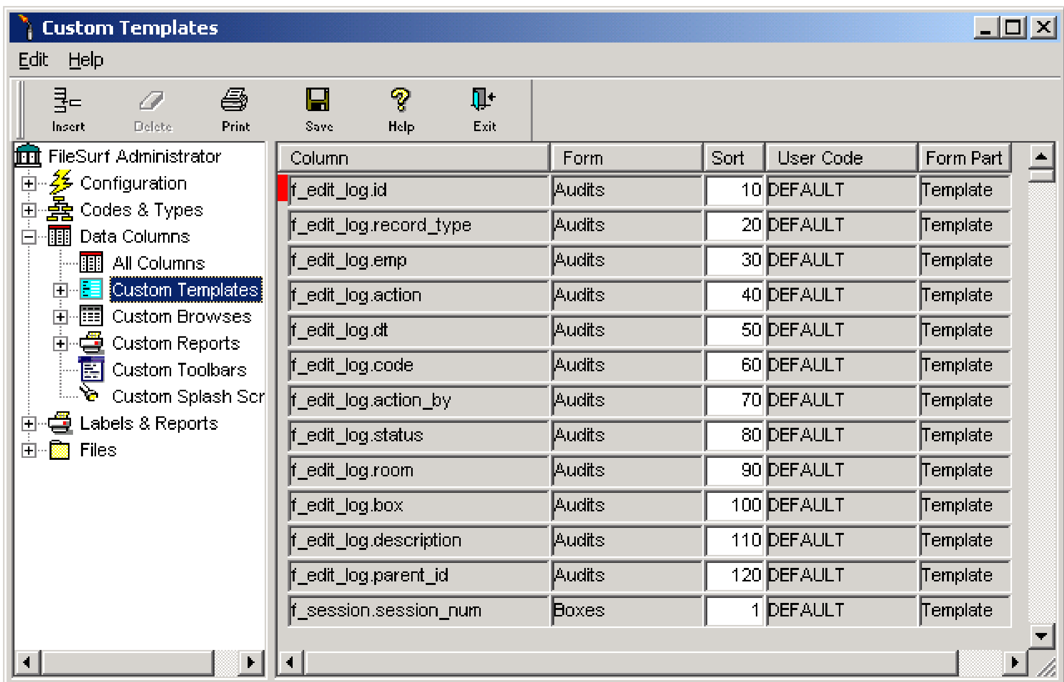

Figure 4-2 Custom Templates Screen

FileSurf provides the ability to display data fields typically found on one Template on several other Templates. For example, the ***Assignee Number*** data field found on the Matter Template can easily be displayed on the Document Template.

Add a Data Field to a Template

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Label*** column to sort the labels in alphabetical order
- Scroll down the ***Label*** column till you find the ***Assignee Number*** data field.

***TIP:** Note the table name (f_matters_users), column name (emp_num) and the code (AS3)*

- Click the ***Custom Template*** icon
- Click the ***Insert*** icon
- Click the ***Column*** data field and scroll down the list to select ***f_matters_users or AS3*** from the pick list
- Click the ***Form*** column and enter ***Document*** or select ***Document*** from the pick list
- Click the ***Sort*** column and enter the number 5 to indicate that the Assignee Number field will appear in fifth place on the Document Template Form
- The ***User Code*** column will be defaulted to *Default*
- Click the ***Form Part*** column and select ***Template*** from the pick list
- Click the ***Save*** icon to save your work.

Setting Default Templates

FileSurf provides the administrator with the capability to customize default template Forms for all members of your organization, for members of a specific Privilege Group and for specific Users or Employees. These customized templates will appear as the default templates in the main application. The screen to customize the Document Form is depicted in Figure 4-3.

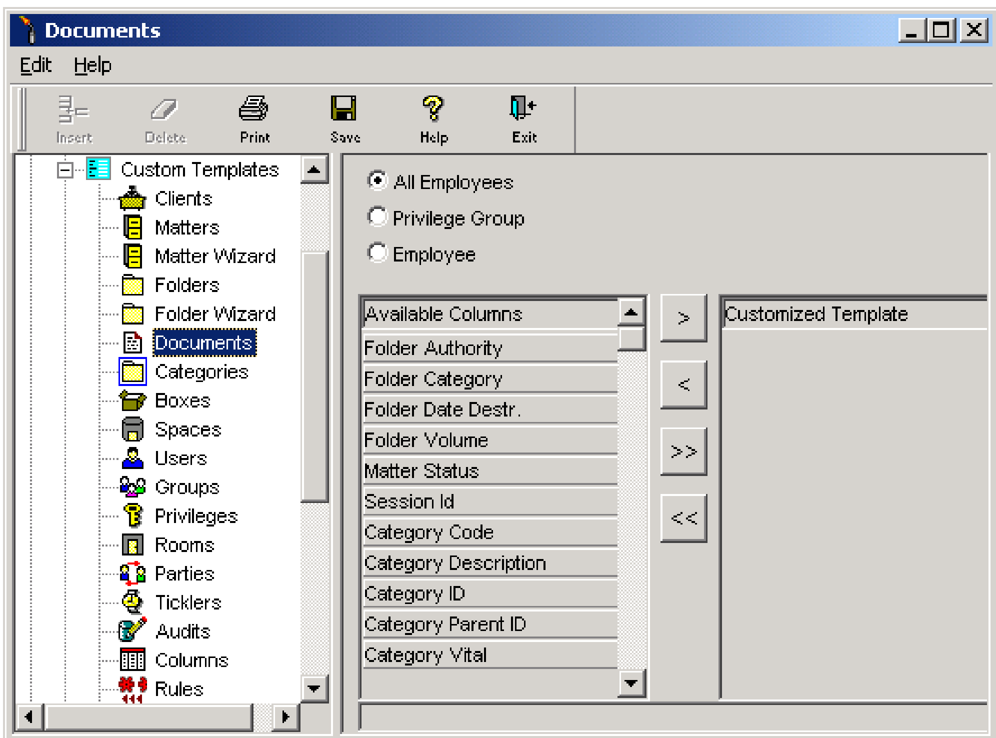

Figure 4-3 Customize Document Template

Once the administrator has configured the default custom templates, you may permit Users to further customize their individual templates by granting them ***Configure Template*** rights via the Privileges Form in the main application.

Customize a Template:

- Expand ***Data Columns***

- Expand ***Custom Template***
- Select the Form to be customized
- Select the group/individual for whom the Template is being customized. Choose from:
  - All Users
  - Privilege Group (select the desired Group from the pick list)
  - User (select the desired User from the pick list)
- Click the ***Available Columns*** heading to sort the fields in alphabetical order
- Select the desired field and drag it from ***Available Columns*** to ***Customized Template*** to include it on the Template
- Select the desired field and drag it from to ***Customized Browse*** to ***Available Columns*** to exclude it from the Template
- Drag the fields under ***Custom Template*** up or down into the order in which they should appear on the Template
- Click the ***Save*** icon to save your work.

Custom Browse

The ***Custom Browse*** screen, depicted in Figure 4-4, serves three purposes. It is used to:

- List the data fields that can appear on at least one of the many FileSurf Browse (search results) screens
- Customize the order in which specific fields will appear on the Browse screen(s)
- Insert additional data fields on a particular Browse screen

Note: *FileSurf automatically adds custom data fields created via the All Columns screen to the appropriate Template. For example, if you add a custom field to the f_contents table, the custom field will automatically be added to the list of available fields for the Document Template, the Document Browse and the Document Configure Reports screen.*

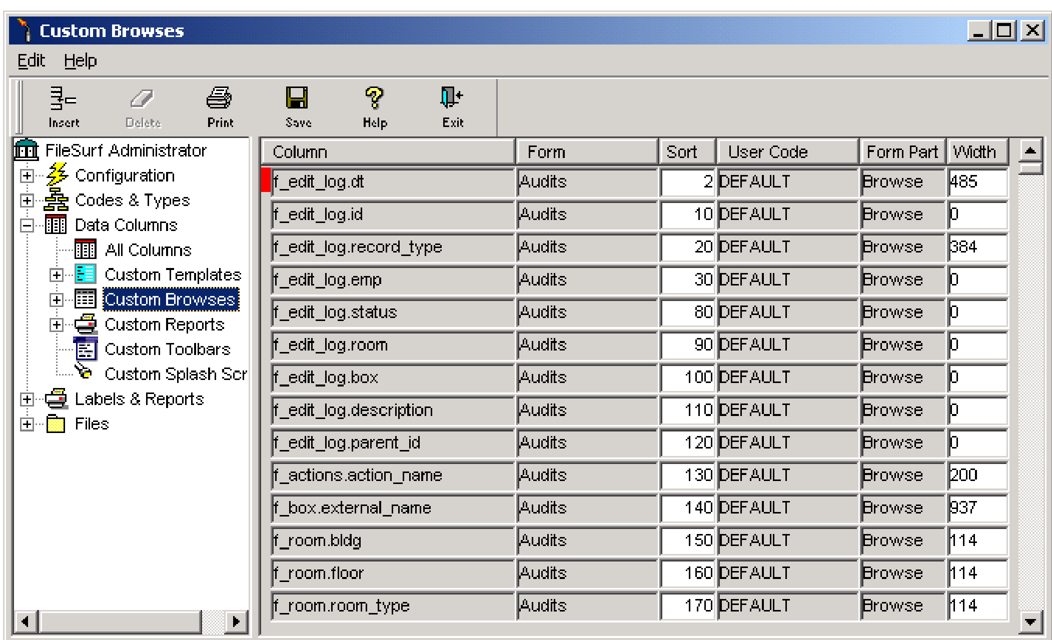

Figure 4-4 Custom Browse Screen

FileSurf provides the ability to display data fields that typically appear on one Browse screen to appear on several other Browse screens. For example, you can add the ***Assignee Number*** data field from the Matter Browse to the Document Browse.

Add a Data Field to a Browse Screen

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Label*** column to sort the labels in alphabetical order
- Scroll down the ***Label*** column till you find the ***Assignee Number*** data field. Note the table name (f_matters_users), column name (emp_num), the code (AS3) and the field size (varchar (8))
- Click the ***Custom Browse*** icon
- Click the ***Insert*** icon
- Click the ***Column*** data field and scroll down the list to select ***f_matters_users or AS3*** from the pick list
- Click the ***Form*** column and enter ***Document*** or select ***Document*** from the pick list
- Click the ***Sort*** column and enter the number 5 to indicate that the Assignee Number field will appear in fifth place on the Document Template Form.
- The ***User Code*** column will be defaulted to ***Default***
- The ***Form Part*** column will be defaulted to ***Browse***
- Click the ***Width*** column and enter the field size (8 in this example). This field size will determine the amount of space needed to display the data on the Browse screen
- Click the ***Save*** icon to save your work.

Setting Default Browse Screens

FileSurf provides the administrator with the ability to customize the Browse screen for all members of your organization, for members of a specific Privilege Group and for specific Users or Employees. These customized Browses will appear as the default Browse in the main application. The screen to customize the Document is depicted in Figure 4-5.

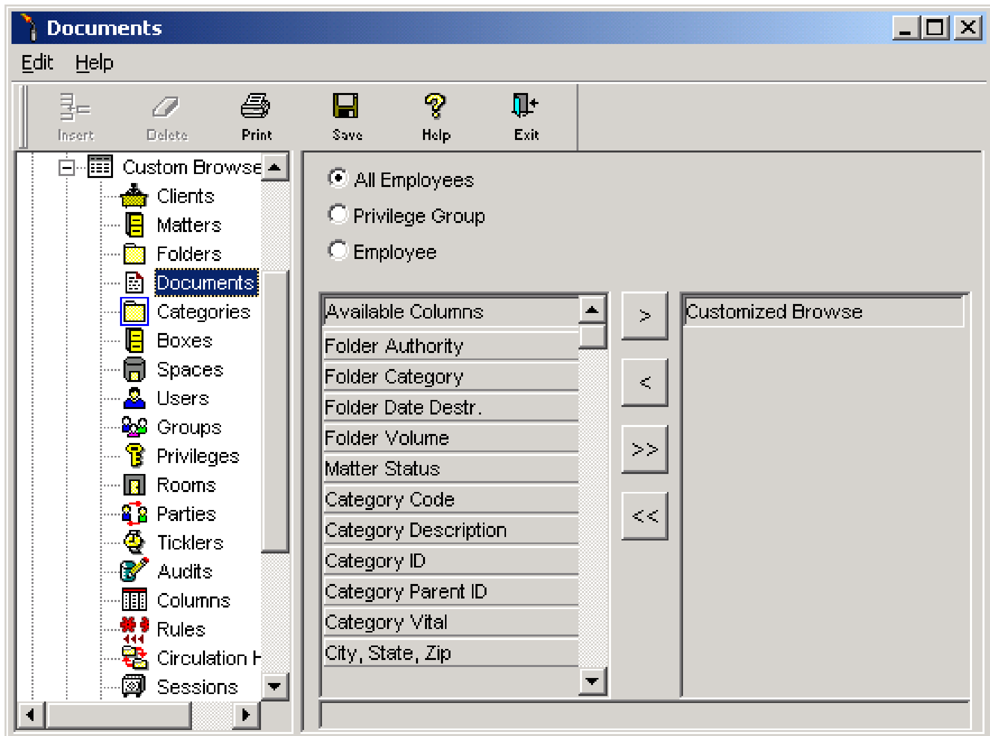

Figure 4-5 Customize Document Browse Screen

Once the Administrator has configured the default custom Browses, you may permit Users to further customize their individual Browses by granting them ***Configure Browse*** rights via the Privileges Form in the main application.

Customize the Browse Screen:

- Expand ***Data Columns***
- Expand ***Custom Browses***
- Select the Form to be customized
- Select the group/individual for whom the Browse is to be customized. Choose from:
  - All Users
  - Privilege Group (select the desired Group from the pick list)
  - User (select the desired User from the pick list)
- Click the ***Available Columns*** heading to sort the fields in alphabetical order
- Select the desired field and drag it from ***Available Columns*** to ***Customized Browse*** to include it on the Browse screen
- Select the desired field and drag it from ***Customized Browse*** to ***Available Columns*** to exclude it from the Browse screen

- Drag the data fields under ***Custom Browse*** up or down into the order in which should appear on the Browse screen
- Click the ***Save*** icon to save your work.

Configuring Custom Reports

The ***Custom Reports*** screen, depicted in Figure 4-6, serves three purposes. It is used to:

- List the data fields that a User may use to configure a customized report in the main application
- Customize the order in which specific fields will appear on the configure report form(s)
- Insert additional data fields on a particular configure reports form

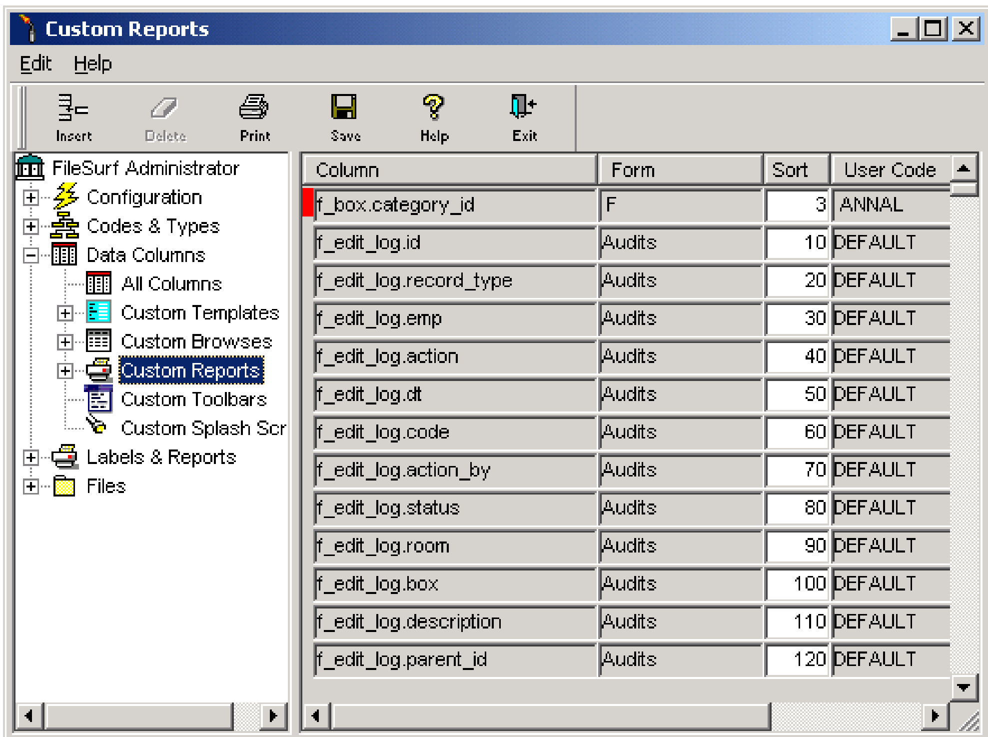

Figure 4-6 Custom Report Screen

FileSurf provides the ability to add data fields from one Form to appear on the configure report screen of another form. For example, you can add the ***Assignee Number*** data field from the Matter Form to the list of data fields available on the Document configure report screen.

Add a Data Field to a Custom Report Screen

- Expand ***Data Columns***
- Click the ***All Columns*** icon
- Click the ***Label*** column to sort the labels in alphabetical order

- Scroll down the ***Label*** column till you find the ***Assignee Number*** data field. Note the table name (f_matters_users), column name (emp_num), the code (AS3) and the field size (varchar (8))
- Click the ***Custom Report*** icon
- Click the ***Insert*** icon
- Click the ***Column*** data field and scroll down the list to select ***f_matters_users or AS3*** from the pick list
- Click the ***Form*** column and enter ***Document*** or select ***Document*** from the pick list
- Click the ***Sort*** column and enter the number 5 to indicate that the Assignee Number field will appear in fifth place on the Document Configure Report Screen
- The ***User Code*** column will be defaulted to ***Default***
- The ***Form Part*** column will be defaulted to ***Report***
- Click the ***Save*** icon to save your work.

Setting Default Custom Report Screens

FileSurf provides the administrator with the capability to customize the configure report screens for all members of your organization, for members of a specific Privilege Group and for specific Users or Employees. These customized screens will appear as the default screens in the main application. The screen to customize Document reports is depicted in Figure 4-7.

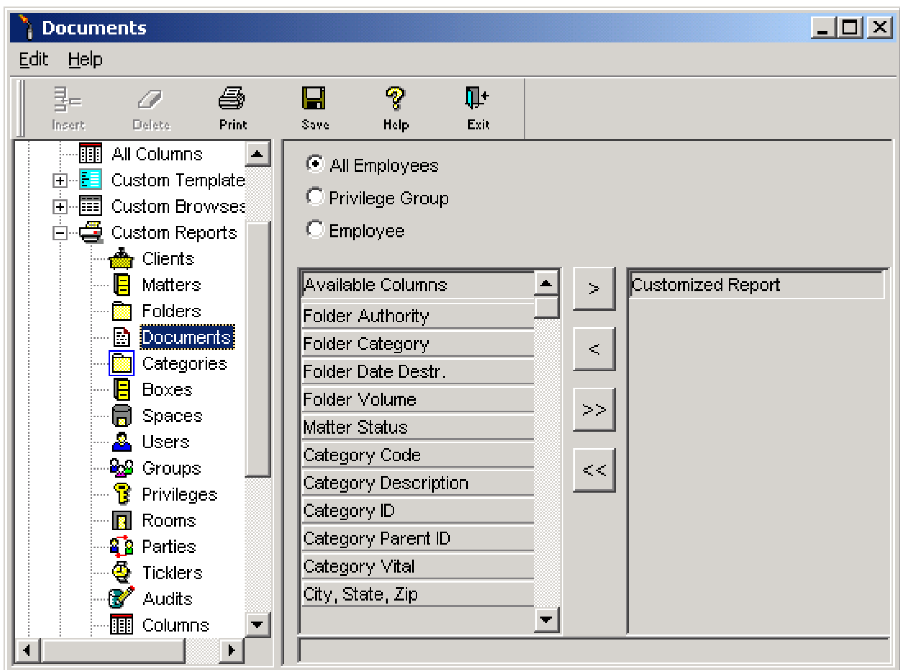

Figure 4-7 Configure Document Reports Screen

Once the administrator has configured the default report screen, you may permit users to further customize their individual screens by granting them ***Configure Reports*** rights via the Privileges Form in the main application.

Customize the Configure Report screens:

- Expand ***Data Columns***

- Expand ***Custom Reports***
- Select the Form to be customized
- Select the group/individual for whom the Browse is to be customized. Choose from:
  - All Users
  - Privilege Group (select the desired Group from the pick list)
  - User (select the desired User from the pick list)
- Click the ***Available Columns*** heading to sort the fields in alphabetical order
- Select the desired field and drag it from ***Available Columns*** to ***Customized Report*** to include it on the customized Report
- Select the desired field and drag it from ***Customized Report*** to ***Available Columns*** to exclude it from the customized Report
- Drag the data fields under ***Custom Browse*** up or down into the order in which should appear on the Browse screen
- Click the ***Save*** icon to save your work

Custom Toolbars/Sheetbars

The ***Custom Toolbars*** screen, depicted in Figure 4-8, is used to specify a default Sheetbar (row of shortcut icons found on each Form) for one or more Forms in the main application.

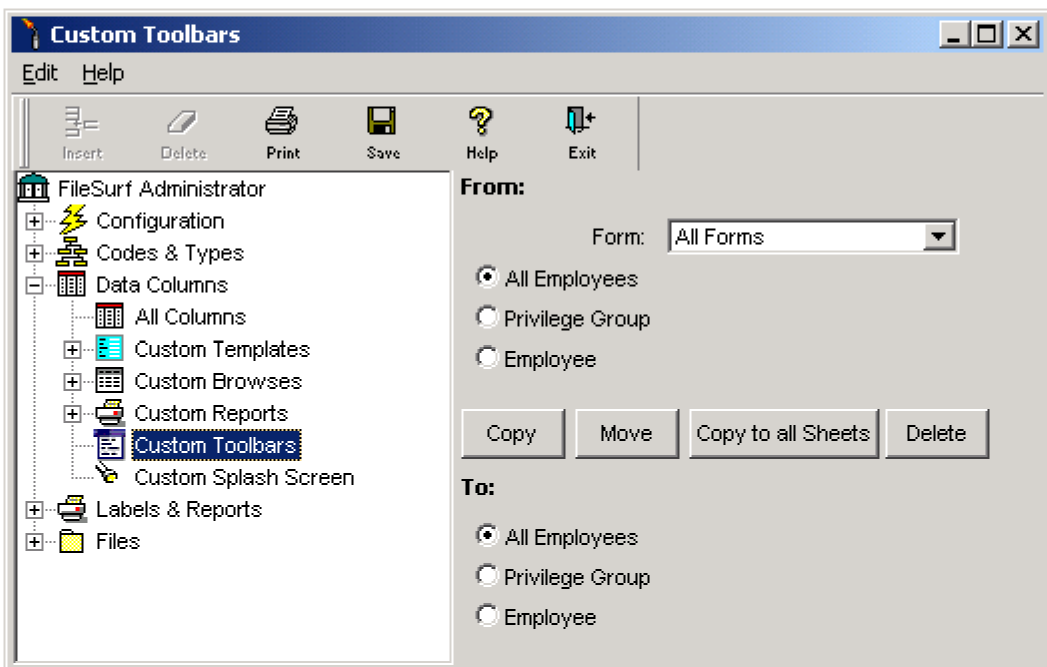

Figure 4-8 Custom Toolbars

Setting Default Toolbars/Sheetbars

The FileSurf Administrator has the ability to customize Toolbars for all members of your organization, for members of a specific Privilege Group and for specific Users or Employees.

***Note**: Although a different Sheetbar may be used for each Form, we recommend the one display be used for all Forms, thereby creating a consistent or "familiar" feel on each Form.*

Once the administrator has configured the default Sheetbar, you may permit users to further customize their individual Sheetbars by granting them ***Configure Toolbar*** rights via the Privileges Form in the main application.

To set a default Toolbar/Sheetbar:

The basic steps outlined below may be used to set a default Toolbar/Sheetbar for any FileSurf Form or User in a variety of combinations. In the following example, the Folder Sheetbar was used to create the default Sheetbar for all Forms for all Users.

- Start in the main application
- Access the Folders Form
- Click ***Window>Toolbar…***
- Configure the Folder Sheetbar as necessary
- Click ***Save***
- Next, open the Administrator and expand ***Data Columns***
- Choose ***Custom Toolbars***
- Mark the **From:** section
  - Choose ***Folders*** from the ***Form*** pick list
  - Mark the ***Employee*** radio button
  - Mark the ***Employee*** radio button and choose the User whose Folder Sheetbar will be copied from the pick list
- Skip to the **To:** section
  - Mark the ***All Employees*** radio button
  - Click the ***Copy to all Sheets*** button
- Click the ***Save*** icon to save your work.

Custom Splash Screen

The ***Custom Splash Screen*** dialog box, depicted in Figure 4-9, is used to list the hyperlinks that can appear on the FileSurf Splash Screen and customize the order in which the hyperlinks will appear on the Splash screen.

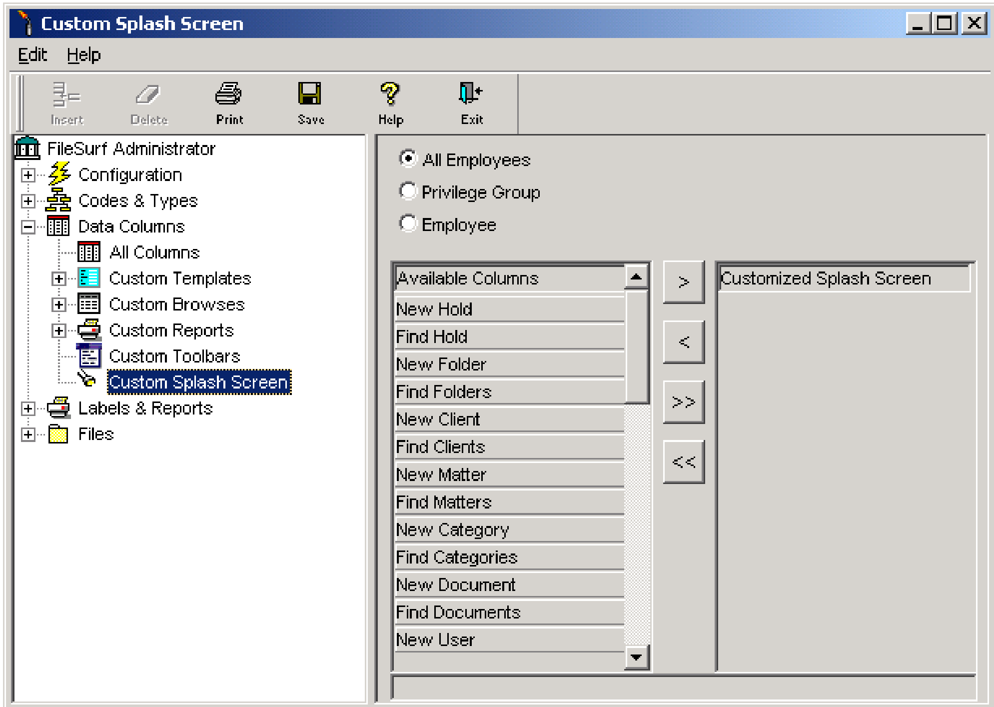

Figure 4-9 Custom Splash Screen

Setting Default Splash Screens

The FileSurf Administrator has the ability to customize the Splash Screen for all members of your organization, for members of a specific Privilege group and for specific Users or Employees. These customized Splash Screens will appear as the default Splash Screen in the main application.

Once the Administrator has configured the default custom browses, you may permit users to further customize their individual browses by granting them ***Configure Toolbar (Administrator)*** rights via the Privileges Form in the main application.

The procedure for customizing the Splash Screen is as follows:

- Expand ***Data Columns***
- Expand ***Custom Splash Screen***
- Select the group/individual for whom the Splash Screen is being customized. Choose from:
  - All Users
  - Privilege Group (select the desired Group from the pick list)
  - User (select the desired User from the pick list)
- Click the ***Available Columns*** heading to sort the fields in alphabetical order

- Select the desired field and drag it from ***Available Columns*** to ***Customized Splash Screen*** to include it on the Splash Screen
- Select the desired field and drag it from to ***Customized Splash Screen*** to ***Available Columns*** to exclude it from the Splash Screen
- Drag the fields under ***Customized Splash Screen*** up or down into the order in which they should appear on the Splash Screen
- Click the ***Save*** icon to save your work.

CHAPTER 5

Labels and Reports

What you will learn in this chapter:

- How to set the parameters that control user access to bar code labels and system reports features
- How to control which labels and reports will appear on the users desktop and how to configure print options such as paper stock, paper size

General

The purpose of this chapter is to introduce you to the parameters that control access to the various bar code labels and fixed reports available in FileSurf and how to configure the settings that control printing the bar code labels and fixed reports.

Labels

The ***Labels*** screen, depicted in Figure 5-1, serves several purposes. It is used to:

- Customize the title of a bar code label
- Control the list of labels displayed in the main application (Reports menu)
- Specify which Form the label is configured for
- Specify print options
- Specify the stock for a particular label
- Specify default label for a particular object
- Reset print commands
- Insert additional custom barcode labels

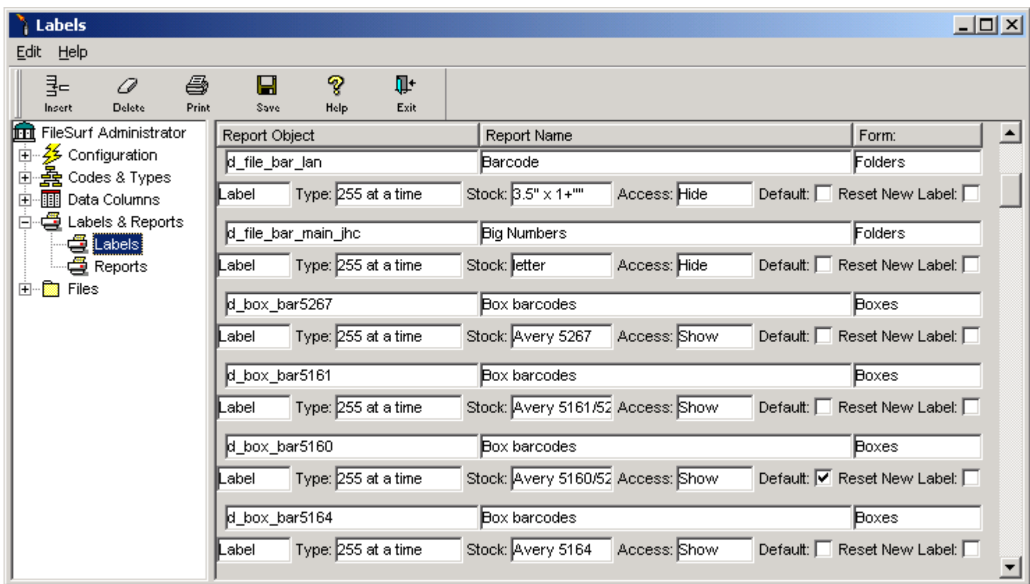

Figure 5-1 Custom Label Controls

Customize Label Names

The procedure to customize the name of a label is as follows:

- Expand *Labels and Reports*
- Click the *Labels* icon
- Scroll down the list of labels to the desired Label
- Click the *Report Name* data field and modify the title to a custom name
- Click the *Access* check box and select one of the following options:
  - *Show* (to display the label in the main application)
  - *Advanced* (to display the label only to users with *Advance Reports* privileges)
  - *Hide* (does not display the label in the main application)

- Click the ***Save*** icon to save your work.

Configuring Parameters for New Labels

The procedure to inserting and configuring the parameters for new labels is as follows:

- Expand *Labels and Reports*
- Click the *Labels* icon
- Click the *Insert* icon
- Enter the database table name in the *Report Object* data field as supplied by the MDY Help Desk staff
- Enter a descriptive name ion the *Report Name* data field
- Click the *Form* data field and select the Form the label will appear on from the pick list
- Click the *Label* data field and select Label from the pick list
- Click the *Type* data field and select one of the following options:
  - Share w/Browse
  - 255 at a time
  - 1 at a time
  - Function
  - Template
- Click the *Stock* data field and enter the stock on which the label will be printed
- Click the *Access* data field and select one of the following options:
  - *Show* (to display the label in the main application)
  - *Advanced* (to display the label only to users with *Advance Reports* privileges)
  - *Hide* (to not display the label in the main application)
- Click the *Default* check box to configure this label as the default for your organization
- Click the *Reset New Label* check box to configure FileSurf to reset the *New Label* feature each time that bar code labels are printed. The *New Label* feature is used to generate bar code labels for new Folders, Boxes, Rooms and Users as they are added to the system. The labels are stored internally until you print them. Once the barcode label is printed, its *New Label* setting is set to ***No*** indicating a label will not be printed during the next print operation. This ***Reset New Label*** function will automatically reset the *New Label* feature back to ***Yes***, enabling another label to be printed during the next print operation
- Click the ***Save*** icon to save your work.

Fixed Reports

The ***Reports*** screen, depicted in Figure 5-2, serves several purposes. It is used to:

- Customize the title of a fixed report
- Control the list of fixed reports that are displayed in the main application
- Specify which Form the report is configured for
- Specify print options
- Specify the paper size for the report
- Insert additional fixed reports

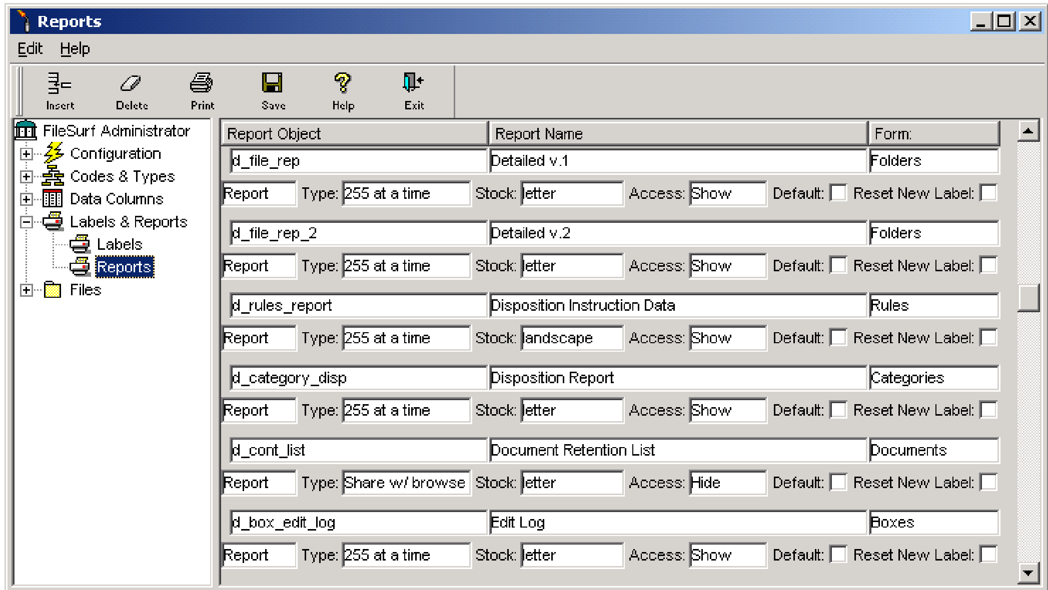

Figure 5-2 Custom Report Controls

Customize Report Names

The procedure to customize the name of a fixed report is as follows:

- Expand *Labels and Reports*
- Click the *Reports* icon
- Scroll down the list of Report names to the desired Report
- Click the *Report Name* data field and modify the title to a custom name
- Click the *Access* check box and select one of the following options:
  - Show (to display the report in the main application)
  - Advanced (to display the report only to users with *Advance Reports* privileges)
  - Hide (does not display the report in the main application)
- Click the ***Save*** icon to save your work.

Configuring Parameters for New Reports

The procedure to inserting and configuring the parameters for new reports is as follows:

- Expand *Reports and Reports*
- Click the *Reports* icon
- Click the *Insert* icon
- Enter the database table name in the *Report Object* data field as supplied by the MDY Help Desk staff
- Enter a descriptive name in the *Report Name* data field
- Click the *Form* data field and select the Form the report will appear on from the pick list
- Click the *Report* data field and select the desired Report from the pick list
- Click the Type data field and select one of the following options:
  - Share w/Browse
  - 255 at a time

   - 1 at a time
   - Function
   - Template
- Click the *Stock* data field and enter the paper size the report was configured for (letter or legal)
- Click the *Access* data field and select one of the following options:
   - Show (to display the report in the main application)
   - Advanced (to display the report only to users with *Advance Reports* privileges)
   - Hide (does not display the report in the main application)
- The *Default* check box is not used for reports
- The *Reset New Report* check box is not used for reports.
- Click the ***Save*** icon to save your work.

C H A P T E R 6

Files

What you will learn in this chapter:

- How to assign default, allowed or prohibited file types to file Categories or Types of Law. Using Folder Types serves to decrease the possibility of misfiling information.
- How to assign documents types from an Electronic Document Management System to FileSurf Folder Types. This feature also serves to decrease the possibility of misfiling information as only documents of a certain type can be filed in folders of a certain type.

General

This chapter describes procedures for assigning default, allowed or prohibited file types to file Categories or Types of Law. FileSurf provides you with the capability to specify the type of folders that can be assigned to a Category level. You must define at least one Folder Type per Category or Type of Law. The use of Folder Types serves to decrease the possibility of misfiling information. These folder types will automatically be inherited by any subordinate sub-category. However, you can override the inherited attributes and assign different folder types to lower level sub-categories.

***Note**: The terms "File" and "Folder" are interchangeable in FileSurf. They are the containers in which records are stored.*

This chapter also describes procedures for assigning documents types from an Electronic Document Management System to FileSurf Folder Types. This feature also serves to decrease the possibility of misfiling information as only documents of a certain type can be filed in folders of a certain type.

Default Folders Matrix

The ***Default Folders Matrix*** screen, depicted in Figure 6-1 below is used to assign default, allowed or prohibited Folder Types to File Categories or Types of Law.

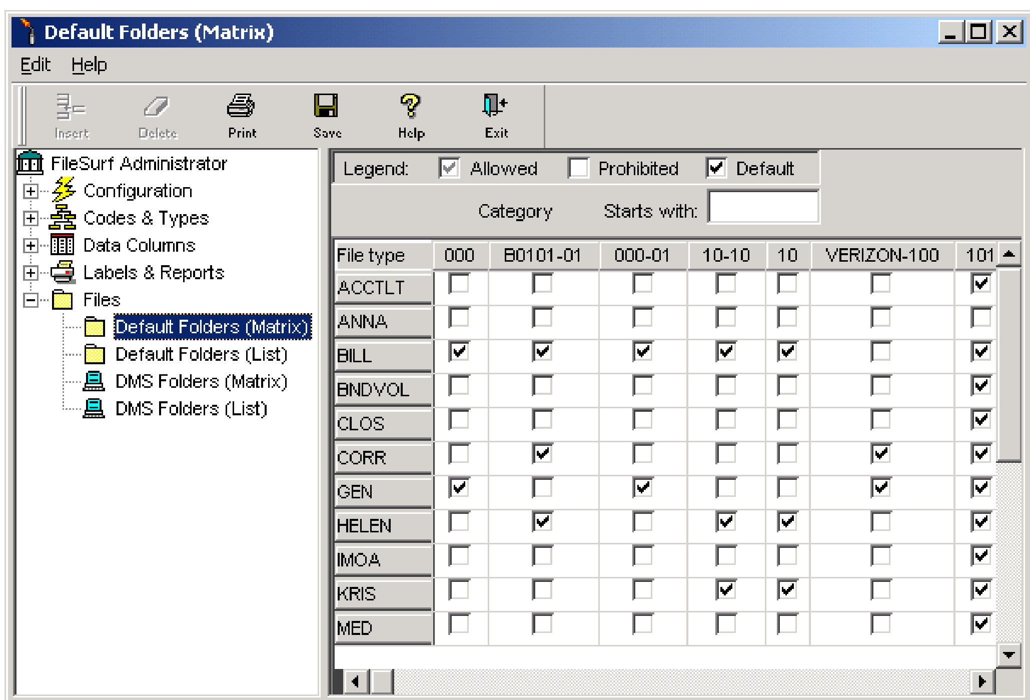

Figure 6-1 Default Folders Matrix

You must have first created the list of possible Folder Types. For each Category level or Type of Law, you may designate each Folder Type to one of the following assignments:

FOLDER TYPE	DESCRIPTION
Default	This Folder Type will appear automatically in the Default Folder List because it will always needed for this Category
Allowed	This Folder Type can be added to the Default Folder List because it may or may not be needed for this Category level
Prohibited	This Folder Type will never appear in the Default Folder List

Assigning Default, Allowed or Prohibited Folder Types

The *Default Folders Matrix* consists of rows and columns of data. Each row represents a Folder Type and each column represents a Category, Sub-Category or Type of Law. At the intersection of each row and column is a check box that is used to indicate the assignment. When first configuring FileSurf, it would be easier to make these assignments in the main application as the Categories and Types of law are created. In this manner, the inheritance feature can be used to simplify the assignment process. This matrix can then be used to make changes to the initial assignments as required.

The procedures for using the matrix is as follows:

- Expand ***Files***
- Click the ***Default Folders Matrix*** icon
- Click the ***Start With*** data field to enter criteria to narrow the list of Categories or Types of Law that appear in the matrix. Enter the first few characters or numbers for the set of Categories needed and press the *Enter* key on your keyboard
- Click the check box corresponding to the Folder Type and Category or Type of Law that you wish to change. Click the check box until the desired assignment is displayed:
  - Normal check mark indicates Allowed
  - Bolder check mark indicates Defaulted
  - No check mark indicates Prohibited
- Click the ***Save*** icon to save your work.

You may click on a specific *Folder Type* row to modify its assignment to every Category or Type of Law. Clicking the *Folder Type* will cycle the display in every check box in the row. In this manner you may quickly make the same assignment for a specific *Folder Type* to every Category or Type of Law.

In addition, you may click on a specific *Category or Type of Law* column to modify the assignment of every Folder Type. Clicking the *Category* will cycle the display in every check box in the column. In this manner you may quickly make the same assignment for every File Type to the specified *Category or Type of Law*.

Default Folders List

The ***Default Folders List*** screen, depicted in Figure 6-2 is a convenient way to identify and change the default Folder Types assigned to each Category or Type of Law.

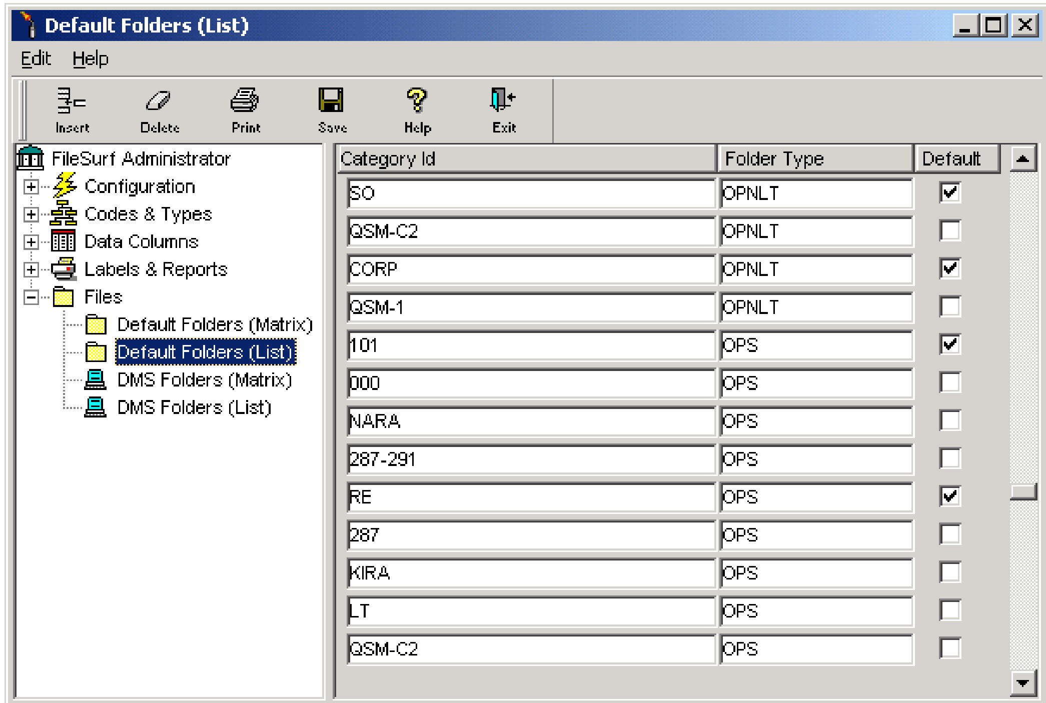

Figure 6-2 Default Folders List

Modifying Default Folder Type Assignments

The *Default Folders List* consists of three columns of data. The ***Category ID*** column lists the Categories or Types of Law. The ***Folder Type*** column lists the names of Folder Types that have been assigned as *Allowed* or *Default* to one or more of the Categories. The ***Default*** column consists of a column of check boxes. A check in the box indicates that the assignment is *Default*. The absence of a check indicates that the assignment is *Allowed*.

The procedures for using the matrix is as follows:

- Expand ***Files***
- Click the ***Default Folders List*** icon
- Click the ***Category Id*** column to sort the data in alphanumeric order
  Or
- Click the ***Folder Type*** column to sort the data in alphabetical order
- Scroll to the Category/Folder Type assignment to be changed
- Click the check box to:
  - Add a check indicating the *Default* assignment
  - Remove a check indicating an *Allowed* assignment
- Click the ***Save*** icon to save your work.

> ***Warning***: *If you click the **Default** column heading, FileSurf will unmark all check boxes, thereby changing all former **Default** assignments to **Allowed**. There is no way to reverse this action!*

DMS Folders Matrix

The ***DMS Folders Matrix*** screen, depicted in Figure 6-3 is used to indicate which EDMS document type(s) can be filed in a particular FileSurf Folder Type. The document types can either be allowed or prohibited.

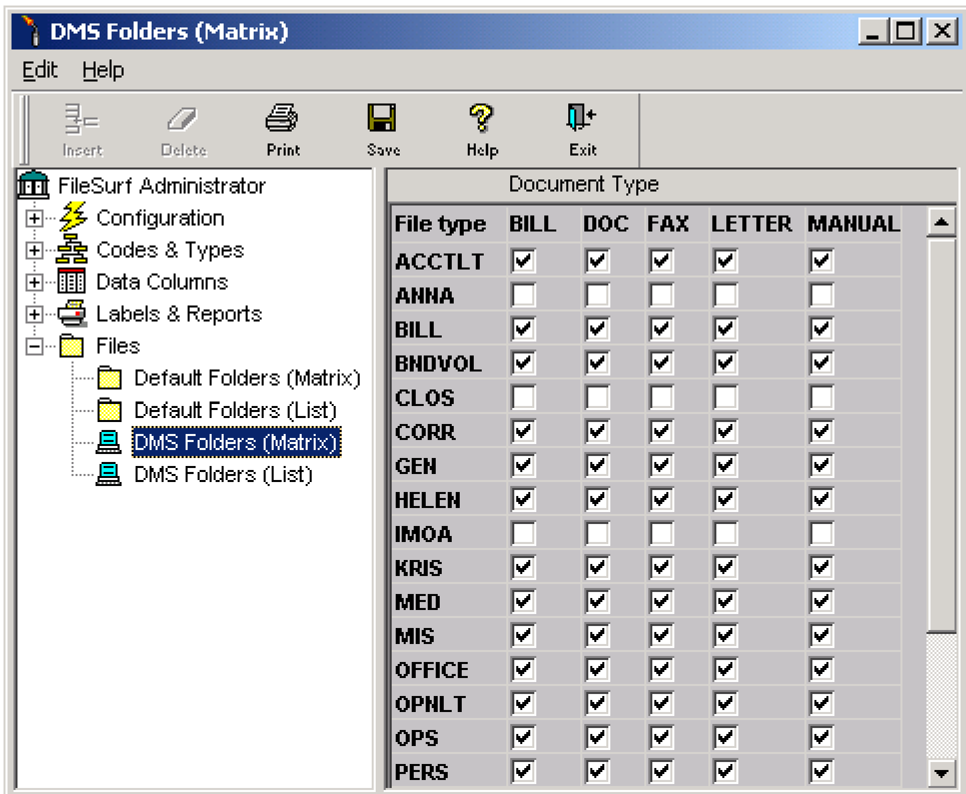

Figure 6-3 DMS Folders Matrix

You must have first created the list of possible Folder Types in FileSurf and the list of possible document types in the document management system. For each Folder Type, you may designate one or more to one of the following assignments:

Allowed Documents of this type can be filed in this FileSurf Folder Type

Prohibited Documents of this type cannot be filed in this FileSurf Folder

Assigning Allowed or Prohibited Document Types

The ***DMS Folders Matrix*** consists of rows and columns of data. Each row represents a FileSurf Folder Type and each column represents a DMS Document Type. At the intersection of each row and column is a check box that is used to indicate the assignment.

The procedures for using the matrix is as follows:

- Expand ***Files***
- Click the ***DMS Folders Matrix*** icon
- Click the check box corresponding to a specific Folder Type and a specific Document Type data field until the desired assignment is displayed:
  - Checked indicates Allowed
  - Unchecked indicates Prohibited
- Click the ***Save*** icon to save your work.

DMS Folders List

The ***DMS Folders List*** screen, depicted in Figure 6-4is a quick way to identify and change the default Document Types assigned to each a specific Folder Type.

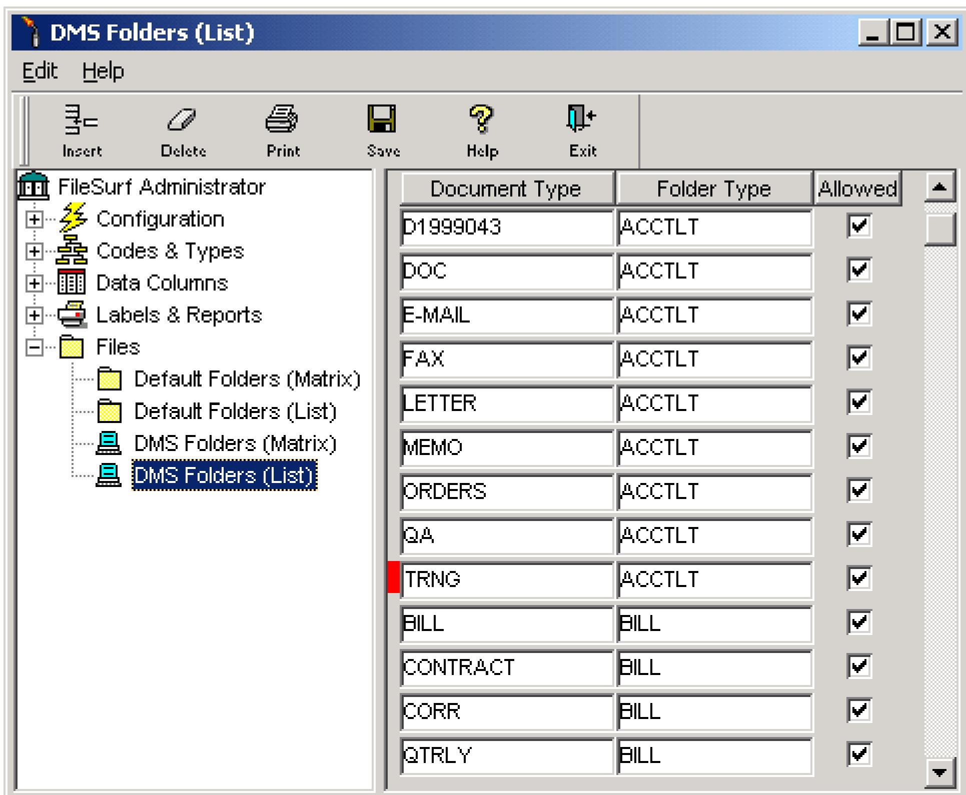

Figure 6-4 DMS Folders List

Modifying Document Type Assignments

The *DMS Folders List* consists of three columns of data. The ***Document Type*** column lists all document types from the document management system that have been assigned as Allowed to one or more Folder Types. The ***Folder Type*** column lists the names of Folder Types that have one or more Document Types assigned as *Allowed*. The ***Allowed*** column is a column of check boxes. A check in the box indicates that the assignment is *Allowed*. The absence of a check indicates that the assignment is *Prohibited*.

The procedures for using the list is as follows:

- Expand ***Files***
- Click the ***DMS Folders List*** icon
- Click the ***Document Type*** column to sort the data in alphabetical order or
- Click the ***Folder Type*** column to sort the data in alphabetical order
- Scroll to the Document Type/Folder Type assignment to be changed
- Click the check box to:
  - Add a check indicating the *Allowed* assignment
  - Remove a check indicating an *Prohibited* assignment
- Click the ***Save*** icon to save your work.