



Goal: This document focuses on enabling a user to Create Doc Classes within EcoDox.

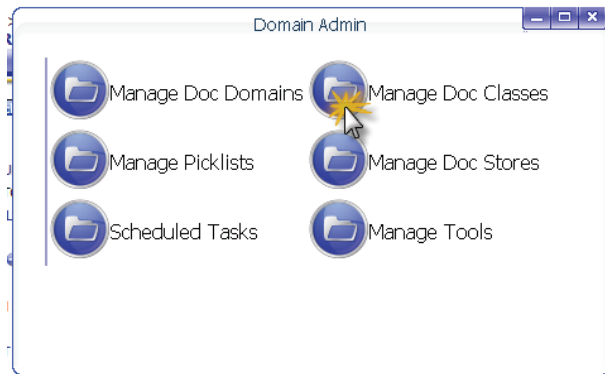
Complexity Level: Admin / Group Admin User

Prereq / Related Instructions: NONE

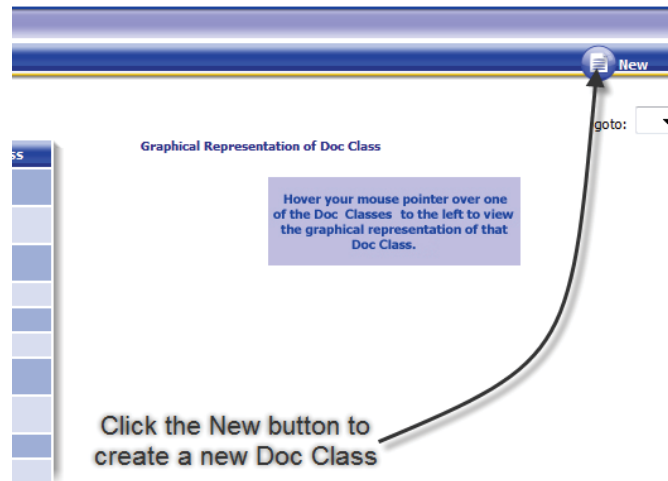
Step 1: Navigate to Domain Admin - Select the **Domain Admin** icon from the **Fisheye Navigation Board**.



Step 2: Domain Admin Menu- Upon selecting the **Domain Admin** icon, a window will open within the browser. Select the **Manage Doc Classes** icon within the window.



Step 3: Create New Doc Class- Select the **New** button to Create a New Doc Class.





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Step 3b: Select Parent Class- Select the **Doc Class** to serve as the Parent Class. If this is the top/first class being made of your structure. After selecting New choose superdoc as the parent class. Once this class is made (the most general in your structure), then continue to create more Doc Classes in whatever hierarchy the structure requires. **This step is very important, if you need assistance please contact support@officeecology.net**



This is a sample of choosing another Doc Class after the initial Class under superdoc has been made. This sample is showing a class that will be a child class to the class named “files”. Keep in mind then that the new class would inherit all the indexes that are used in the the “files” class.

Choose a parent - your new DocClass will inherit all indexes from its parent

Class Name	Class Description
ACCOUNTS PAYABLE	ACCOUNTS PAYABLE
Accounts Payable Checks	Accounts Payable Checks
ACCOUNTS PAYABLE DOCS	ACCOUNTS PAYABLE DOCS
ACCOUNTS RECEIVABLE	ACCOUNTS RECEIVABLE
AGREEMENTS	AGREEMENTS
APPLICATIONS	APPLICATIONS
APPRAISAL	APPRAISAL
ATTORNEYS OPINION	ATTORNEYS OPINION
BENEFITS	BENEFITS
BIDS	BIDS
BLUEPRINTS	BLUEPRINTS
CHECKS	CHECKS
CLIENT	CLIENT
CLIENT APPLICATION	MORT CLIENT APPLICATION
COMPLIANCE	COMPLIANCE
CONSULTS	CONSULTS
CORRESPONDENCE	CORRESPONDENCE
CORRESPONDENCE DOCS	CORRESPONDENCE DOCS
CREDIT REPORT	CREDIT REPORT
DISCIPLINARY WRITE-UP	DISCIPLINARY WRITE-UP
DOCTORS NOTES	DOCTORS NOTES
DRUG TESTING	DRUG TESTING
EHR	EHR
EMERGENCY CONTACTS	EMERGENCY CONTACTS
EVALUTATION FORMS	EVALUTATION FORMS
FILES	FILES
GARNISHMENTS	GARNISHMENTS

Graphical Repre

Carefully select the Doc Class you wish to have your new Doc Class under in the hierarchy.



How To: Create a Doc Class

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Once all steps are completed to make a new Doc Class, it will appear under the Doc Class selected in Step 3b.

Document Hierarchy

- AP
- CONTRACTOR
- GENERAL
 - FILES
 - ACCOUNTS PAYABLE DOCS
 - ACCOUNTS RECEIVABLE
 - AGREEMENTS
 - CHECKS
 - CORRESPONDENCE DOCS
 - HUMAN RESOURCE DOCS
 - OTHER
 - PAYROLL
 - REPORTS

Search Inactive
Show All Indexes
Show Additional Info
Full Text Search

COMPANY NAME:
INVOICE NUMBER:
PO NUMBER:
DATE:

New Doc Class will appear below the Doc Class selected in previous screen when all steps are finished.

Step 3c: Doc Class Properties - Be sure to name your Doc Class and give a description.

EcoDox™
Powered by Singularity

Singularity > Imaging Administration > Add a Document Class

Document Class Detail

- Document Class Name** A value is required
- Document Class Description** A value is required
- Document Class Retention Time** A value is required
- Document Class Permission**



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Step 3d: Doc Class Retention - Select a value from the Pick List. This value determines how long documents within a Doc Class remain active within EcoDox Archive. Select **Never Purge** to make the Doc Class retention that of permanent.

Pick a value from the drop down list for retention time.

Step 3e: Doc Class Creation - Select the **Create** button

Select this button to Create



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Step 4: Create Indexes - Select **Document Index** on the blue toolbar to create Indexes for your new Doc Class.



Step 4b: Existing Indexes - The list of Indexes (search criteria) that show up immediately are indexes inherited by the Doc Class higher up in the hierarchy. Any new indexes should be something new to the list and relate only to the new Doc Class being created.

Document Class Indexes

Index Name	Index Belongs To	Index Type	Index Size	Delete Index?	External Search URL
NAME	FILES	string	50		
STATUS	FILES	Yes-No	0		
DATE	FILES	datetime	10		
TAG	FILES	string	200		

Step 4b: Create Indexes - All fields are required when creating new indexes.

Singularity> Imaging Administration> Add an Index

Add an Index to testCreate

Save

- Index Name: testIndex
- Index Type: [Dropdown]
- Index Size: 30
- Index Required: Yes
- Index List Viewable: Yes
- Index Searchable: Yes



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Step 4c: Index Type Dropdown - It is important to choose the right Index Type which will allow only those characters to be entered into the system.

Index Name:

Index Type:

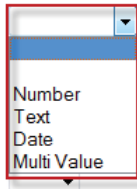
Index Size:

Index Required:

Index List Viewable:

Index Searchable:

Default Value:



It is recommended to use **Text** if you wish the indexes will be letters, numbers, symbols or all three. Use **Date** if the indexes are calendar dates.

The other options in this dropdown are for more advanced settings.

Step 4d: - Type in the number of characters that are necessary for that index. This is setting the maximum characters that can be entered into that index field.

! Index Name:

! Index Type:

! Index Size:

! Index Required:

! Index List Viewable:

! Index Searchable:

Default Value:

Step 4e: Required Index - Select Yes from the Pick List to make the Index required.

! Index Name:

! Index Type:

! Index Size:

! Index Required:

! Index List Viewable:

! Index Searchable:

Default Value:



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Step 4f: Viewable Index - Select Yes from the Pick List to make the Index viewable from Search. Viewable Indices can be seen by all users with permissions to search for documents.

Step 4g: Index Searchable - Select Yes from the Pick List to make the Index Searchable. Searchable Indices are available to use as a search Parameter.

Step 5: New Index - The new index will appear in the list of Indexes once the **Save** button is selected.

Index Name	Index Belongs To	Index Type	
NAME	FILES	string	50
STATUS	FILES	Yes-No	0
DATE	FILES	datetime	10
TAG	FILES	string	200
testIndex	testCreate	string	30

Select this button to Save

Complete!!!

