



Deficiency Manager
Quick Start Guide
Platform Services Version

All rights reserved

Kelley Connect

Deficiency Manager

Program Updated by Chris Gritton

Quick Start Guide Updated January 20, 2021

Contents

Page	Description
3	Preface
3	What is Deficiency Manager?
3	Licensing
4	Installing Deficiency Manager
9	Starting Deficiency Manager
11	Configuring Deficiency Manager
13	Select List Configuration
18	Update Index Options
21	Result Display
	Creating a Deficiency Report
23	Viewer Options
26	Feature List
27	DocuWare Administration Setup
30	Variable Search Dialog Setup
41	Missing Documents show in a list when no documents are available for a selection



Deficiency Manager Quick Start Guide

Preface

This manual describes basic information to use the Deficiency Manager Module.

What is Deficiency Manager?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Deficiency Manager allows users to view documents that exist in a DocuWare file cabinet together with a list of required documents that are missing from the file cabinet. Document groups are displayed in Deficiency Manager as folders. Clicking on any folder the available documents are shown in a result list. Overlaying a DocuWare Select List of required documents allows any document type that is missing to be displayed as a colored row at the top of the Result List. After viewing and editing the index data, the user may select a single, pre-configured button to update field values for the entire set of records.

Typical applications include medical records, loan applications, human resources, and student transcripts. The templates may also be configured to show records in a file cabinet that are missing index information. Each template will be visible as a tab across the top of the **Deficiency Manager Configuration Window**. The Deficiency manager templates can be set up to allow a user to track deficient documents in applications where documents are expected to be stored over a period of time.

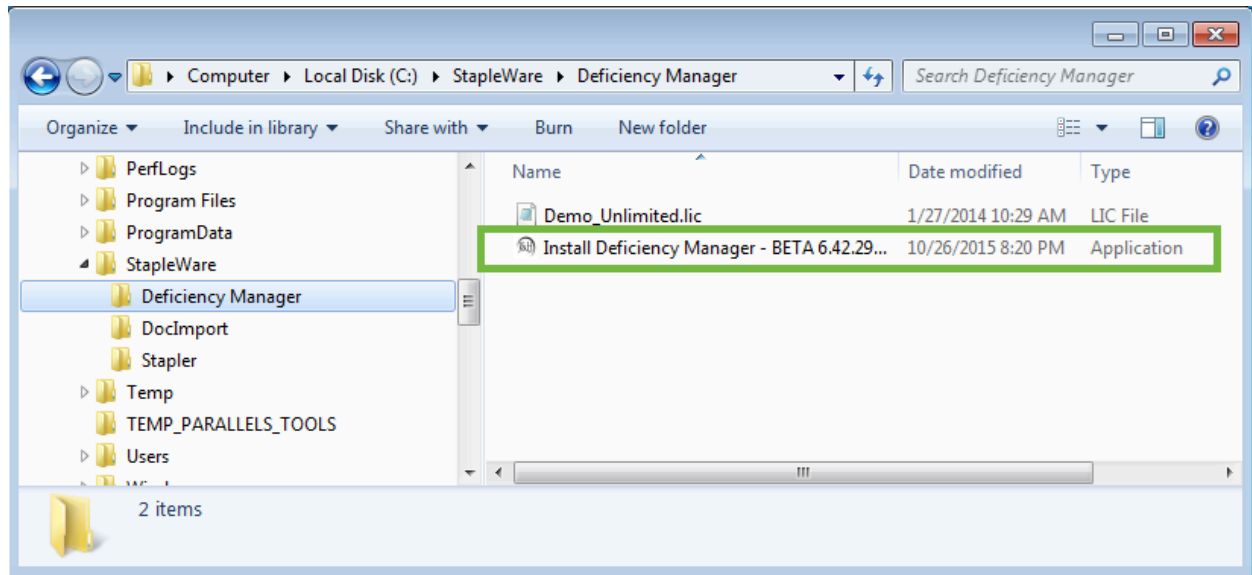
Licensing

The user must have a valid license file for the module that is being installed. This license should be placed in a **License** folder that has been created in the DocuWare directory or under the C:\ root drive on the local machine. If you receive a license file with a .zip extension, place the .zip in the license folder and double click to extract the license file.

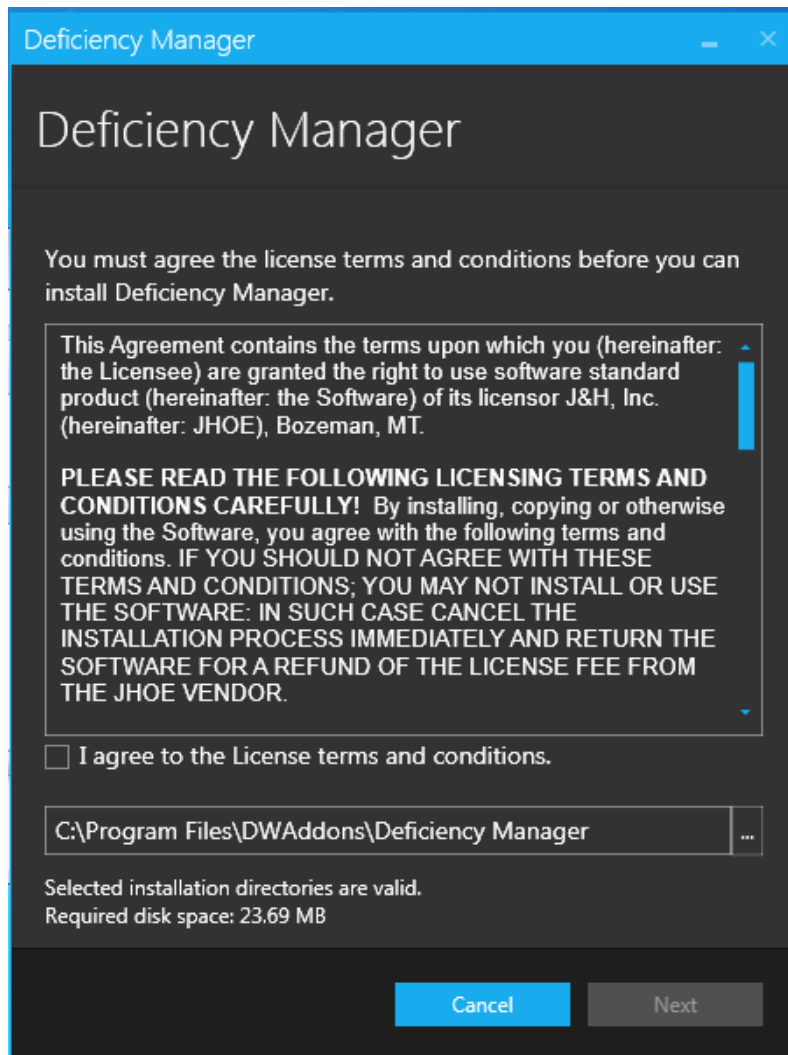
Installation

Download the Deficiency Manager from the StapleWare website at www.stapleware.com. Open the **Deficiency Manager Installer.zip** setup utility. Double-click the **Deficiency Manager.msi** and run the program from its current location. The install wizard will lead you through the setup process.

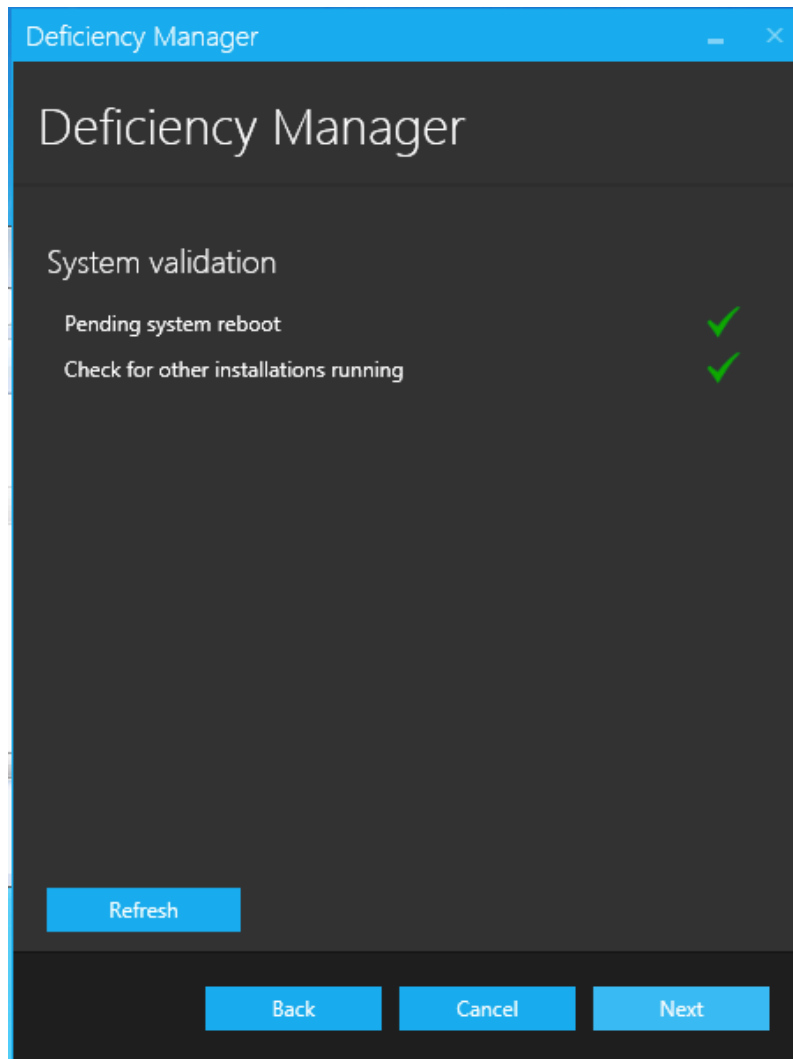
Installing Deficiency Manager



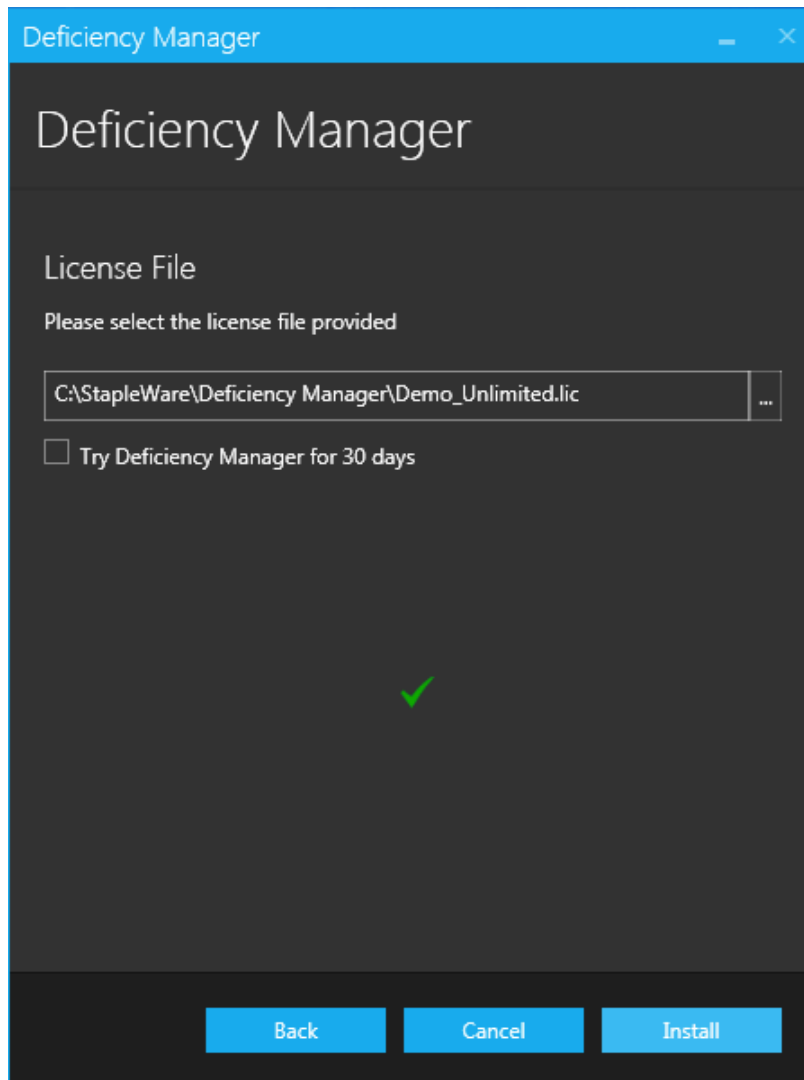
Note: If you're currently using this software and this installation is an upgrade - Please close the program, exit the services (*if applicable*), and uninstall the program before running the upgrade.



You must read and agree to the license terms and conditions and then click **Next** to proceed...



System validation allows the installation utility to check on the pending update status to be sure the system is not ready to reboot.



If the license file has not yet been selected, please click the ellipsis and navigate to the license file folder on the hard drive.

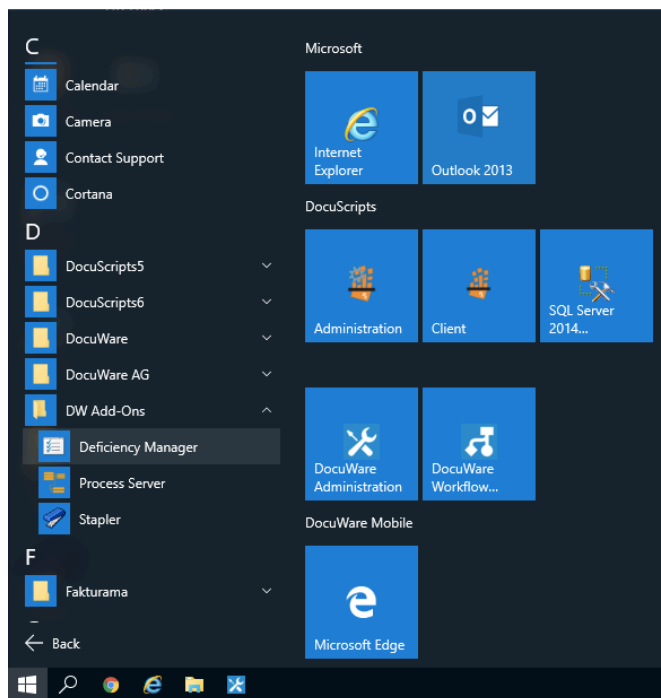
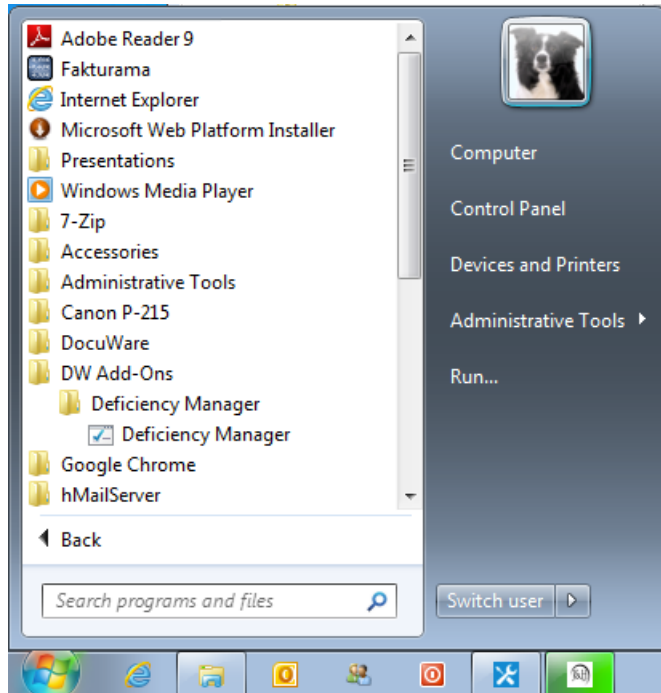
Click Install to proceed.



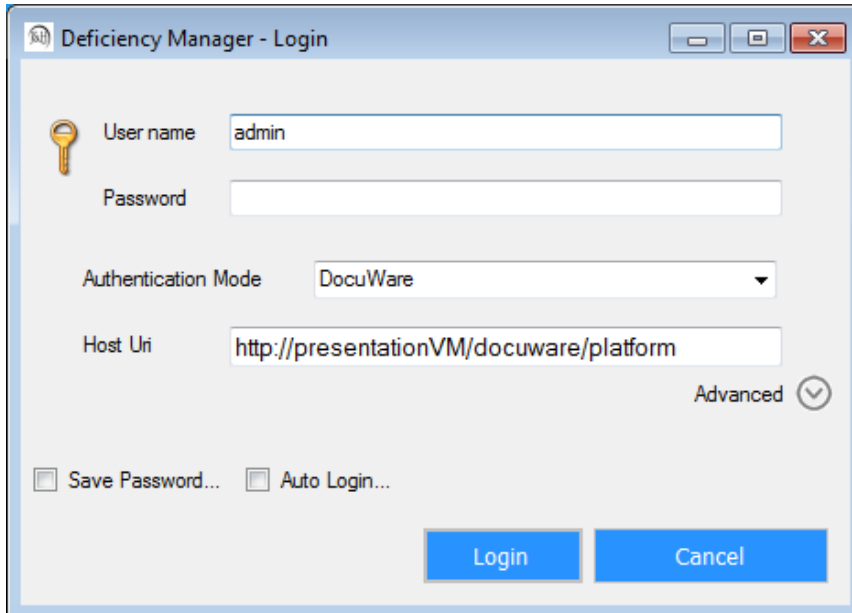
Click **Close** to exit the installation process.

Starting Deficiency Manager

Deficiency Manager may be started from the **Start Menu**. It is located under: Start/All Programs/DW Add-Ons/Deficiency Manager/Deficiency Manager.



When Deficiency Manager opens, the user will be asked for a username, password, and organization. After filling in these fields, the user will have access to the Deficiency Manager program.

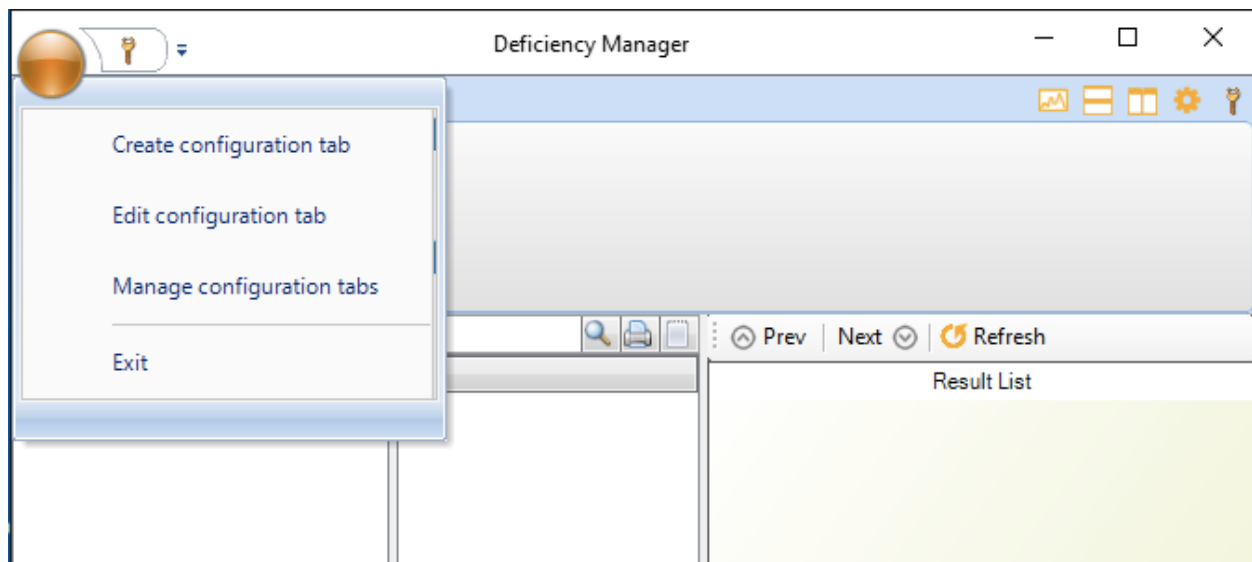
The image shows a Windows-style dialog box titled "Deficiency Manager - Login". It contains several input fields: "User name" with the text "admin", "Password" (empty), "Authentication Mode" with a dropdown menu showing "DocuWare", and "Host Uri" with the text "http://presentationVM/docuware/platform". There is an "Advanced" button with a downward arrow. At the bottom, there are two checkboxes: "Save Password..." and "Auto Login...", both of which are unchecked. At the very bottom are two blue buttons: "Login" and "Cancel".

The user may also elect the Windows Authentication Mode. You must type in the Host URI (a **Uniform Resource Identifier (URI)** is a string of characters used to identify the name of a resource. Such identification enables interaction over a network, typically the World Wide Web). This can be found in DocuWare Administration. By selecting the Save Password Check Box and the Auto Login check box Deficiency Manager will no longer require specific login information.

Prior to starting the configuration process, you must go to DocuWare Configurations and set up the Search Dialog and the Result Dialog that will be used to build your configuration. **Please see Page 27 for instructions on setting up the DocuWare Dialogs.**

Building a Configuration Tab

The control button in the upper-left corner of the dialog box will open the file options menu for the StapleWare Deficiency Manager. From here, the user may create, edit or manage configuration tabs.

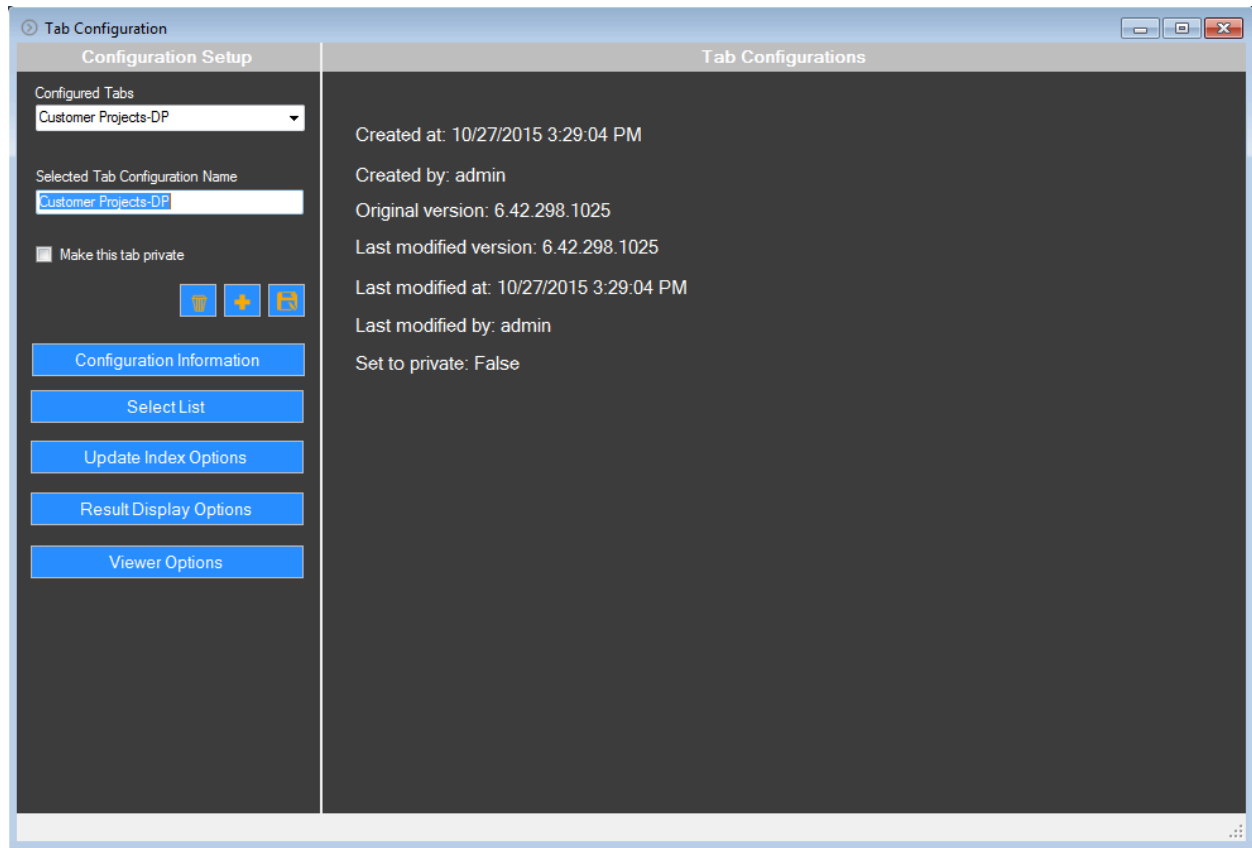


By Selecting “Create configuration tab” from the list you will be asked to create a name for the new configuration tab. This should be a name that will uniquely identify the deficiency list as you add more tabs to the program. It is also a good idea to provide the name of the File Cabinet where the records reside.

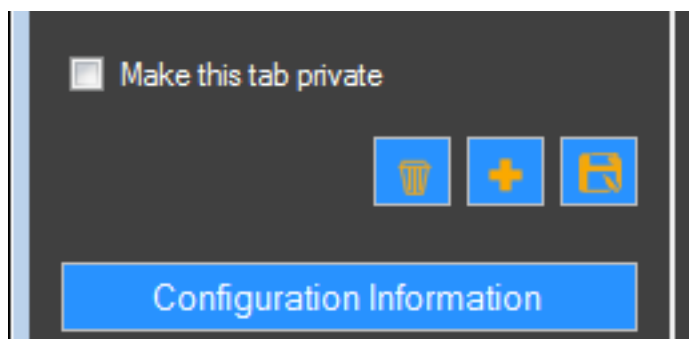
A screenshot of a dialog box titled 'Enter new tab name'. It has a dark gray background. At the top, the text 'Enter new tab name' is displayed in a light gray font. Below the text is a long, empty white text input field. In the bottom right corner, there is a blue button with the text 'OK' in white.

Configuring a Deficiency Manager Configuration Tab

In this case we will create a configuration tab for the Document Pool that will track deficient documents for customer projects.



The configuration tab may be public or private. Please note the three icons under the “Make this tab private” check box. These icons are “Delete”, “Add New” and “Save” respectively.



This is the Configuration Information Tab.

Select List Configuration

Select the “Select List” Button under the “Configuration Information” button to navigate to the configuration setup.

Here you will,

1. Select the File Cabinet where the documents are stored,
2. Select the Search dialog that will be used to access the Documents from DocuWare,
3. The Select List field that will be represented by Folders in the Tab,
4. The Selective Select List that is important if you require two grouping levels,
5. The “Variable Search dialog” check box if multiple Search Dialogs will be used (See page 30),
6. The “Use System Field” check box that will be used if the Select List will be a DocuWare system field,
7. The “Filter” check box that is used if the documents will be filtered by a Document Status.

Before you start the “Select List” configuration you must have a Fixed Select List of the required documents, a Search Dialog, a Result View Dialog that has the Select List associated with the Document Type field in the Index Dialog of the Result View. Please refer to the DocuWare Configuration setup that must be completed prior to setting up the Deficiency Manager Tabs. (Page 27)

In this case we will use the Document Pool File cabinet from the dropdown list.

The screenshot shows the 'Tab Configuration' window with the 'Select List' tab active. The 'Select file cabinet' dropdown menu is open, showing options: 'choose...', 'choose...', 'Document Pool', 'Employees', 'Stapler', and 'choose...'. The 'Document Pool' option is highlighted. Other settings include 'Selected Tab Configuration Name' as 'Customer Projects-DP', 'Make this tab private' checked, and 'Use selective select list' checked.

The Search Dialog will be the Project-DM Search Dialog.

The screenshot shows the 'Tab Configuration' window with the 'Select List' tab active. The 'Search dialog' dropdown menu is open, showing options: 'choose...', 'choose...', 'Accounting+', 'Project-DM', 'Search+', 'Search', 'Purchase Requisition', 'Accounting', 'Standard Search Dialog', and 'custom'. The 'Project-DM' option is highlighted. Other settings include 'Selected Tab Configuration Name' as 'Customer Projects-DP', 'Make this tab private' checked, and 'Use selective select list' checked.

The Select List Field will be the Company Name. This will group all of the documents by Company Name and show them as a folder in the left panel of the Deficiency Manager.

The screenshot shows the 'Tab Configuration' window with the 'Select List' tab active. The 'Select list field' dropdown menu is open, showing options: 'choose...', 'choose...', 'Accounting+', 'Project-DM', 'Search+', 'Search', 'Purchase Requisition', 'Accounting', 'Standard Search Dialog', and 'custom'. The 'Company' option is highlighted. Other settings include 'Selected Tab Configuration Name' as 'Customer Projects-DP', 'Make this tab private' checked, and 'Use selective select list' checked.

The next step is to determine if a Selective Select List will be necessary. The Selective Select List will enable the user to view two sets of folders for any result list. Examples include all projects for each company, or all visit numbers for each medical record. In this case we will be displaying all projects for each company so we will use the Selective Select List and the field will be the 'Project' field.

The screenshot shows the 'Tab Configuration' window with two main sections: 'Configuration Setup' and 'Select List'.

Configuration Setup:

- Configured Tabs: Customer Projects-DP (dropdown)
- Selected Tab Configuration Name: Customer Projects-DP (text field)
- ☐ Make this tab private
- Buttons: Configuration Information, Select List

Select List:

- Select file cabinet: Document Pool (dropdown)
- Search dialog: Project-DM (dropdown)
- Select list field: Company (dropdown)
- ☒ Use selective select list
- Selective select list field: Project (dropdown)
- ☐ Do not filter result grid results

Filtering the Set of Records to be Displayed

Sets of records that are complete, the set contains all of the required documents, will be set to a STATUS of 'Complete'. For this reason, we will not want to display document sets that have been completed. The filter will allow the user to restrict documents that have been completed. You may use the following expressions for any of the fields in the file cabinet:

1. <> VALUE (ie. <> COMPLETE)
2. EMPTY()
3. NOTEMPTY()

This screenshot is similar to the previous one but includes additional filter options at the bottom of the 'Select List' section.

Configuration Setup:

- Configured Tabs: Customer Projects-DP (dropdown)
- Selected Tab Configuration Name: Customer Projects-DP (text field)
- ☐ Make this tab private
- Buttons: Configuration Information, Select List, Update Index Options, Result Display Options, Viewer Options

Select List:

- Select file cabinet: Document Pool (dropdown)
- Search dialog: Project-DM (dropdown)
- Select list field: Company (dropdown)
- ☒ Use selective select list
- Selective select list field: Project (dropdown)
- ☐ Do not filter result grid results
- Filters:
 - Tax Percentage 2: [] - []
 - Status: <> COMPLETE (dropdown)
 - Next User: []

You may also Right Click in any field in the configuration tool. The right Click will show the select list values for any field. You can select any one of the values from the list to filter for that specific value.

The screenshot displays the 'Tab Configuration' window with the 'Select List' tab active. The left sidebar shows configuration options for the 'Projects-DP' tab, including a 'Make this tab private' checkbox and buttons for 'Configuration Information', 'Select List', 'Update Index Options', 'Result Display Options', and 'Viewer Options'. The main area is divided into two sections: 'Configuration Setup' and 'Select List'.

Configuration Setup:

- Configured Tabs: Projects-DP
- Selected Tab Configuration Name: Projects-DP
- ☐ Make this tab private
- Buttons: Configuration Information, Select List, Update Index Options, Result Display Options, Viewer Options

Select List:

- Select file cabinet: Document Pool
- Search dialog: Enhanced
- Select list field: Company
- ☒ Use selective select list
- Selective select list field: Project
- Filters: ☐ Filter should only be applied to select lists - If selected result list will not use filter other than the select list selections.

Field Values:

Field	Value
Contact	
Department	
Subject	
DocType	
Date	
Format	
Status	
Customer Number	
Voucher Number	

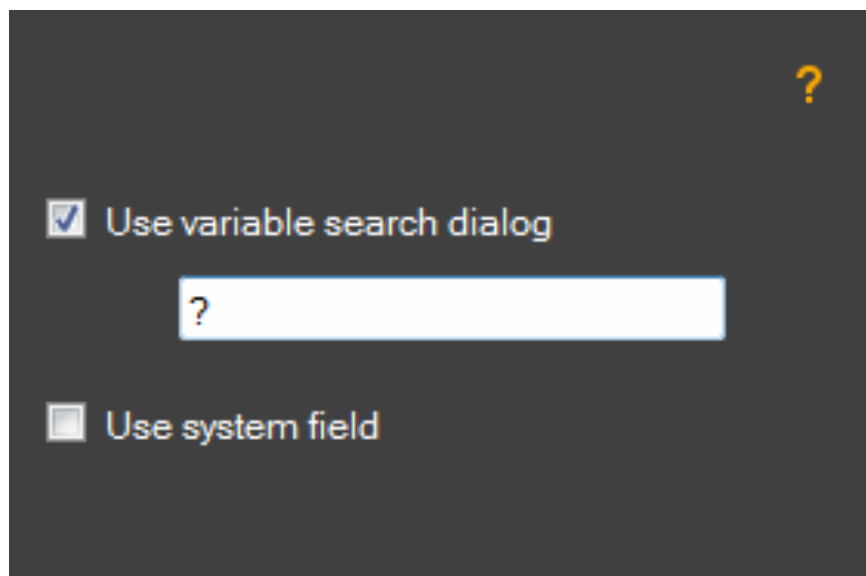
Dropdown List:

- active
- approved
- complete
- Contract alert
- inactive
- NEW
- paid
- Review

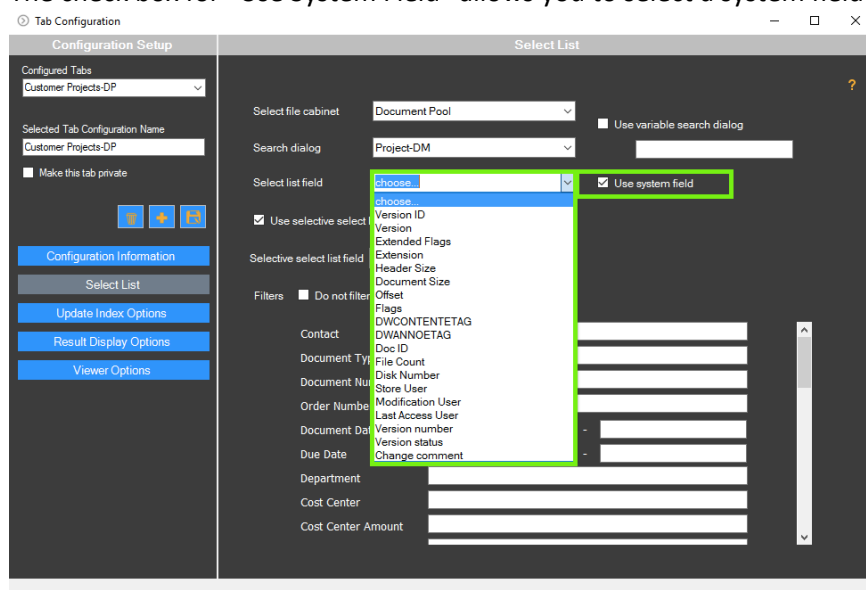
Variable Search

The check box for “Use Variable Search Dialogs” allows you to create multiple Search Dialogs and assign them to multiple values that exist in a field in the file cabinet. If the name of a search dialog matches the value in the selected field, then that dialog will be used. If you place a “?” in the text box under the “Use variable search dialog” check box, the Select List must exactly match the Index Value. If you place a “?*” in the text box under the “Use variable search dialog” check box, the Index Value will match the Select List but may contain additional characters as well.

Please refer to page 30 for instructions on setting up the “Use Variable Search Dialog” check box.



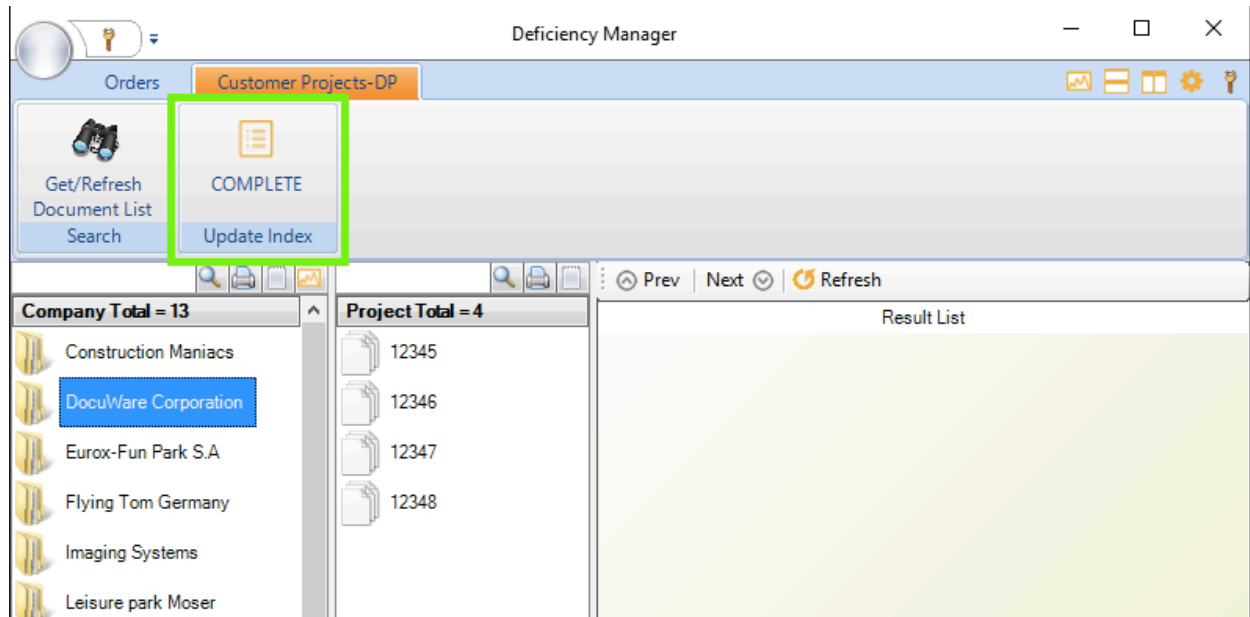
The check box for “Use System Field” allows you to select a system field as a grouping field.



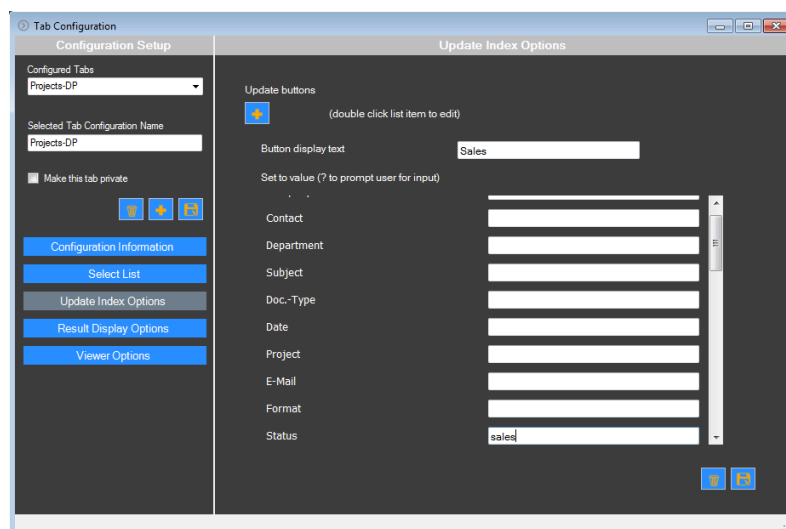
Update Index Options

Select the “Update Index Options” Button under the “Configuration Information” button to navigate to the configuration setup for the update buttons. These quick links allow the user to click a single button to update an entire set of records. In this case we will create a button called “Complete” that, when clicked, will update the STATUS field in result list with a status of “Complete”. If the filter for the Tab has been set to ignore all record sets that have a STATUS of “Complete” then the folder will drop off of the list. Please note that the documents are still in the file cabinet but will not show in the Tab.

The update buttons appear at the top of the Deficiency Manager window.



By clicking the PLUS sign in the Configuration of the tab you will be able to configure a new update button. The buttons allow the index fields for selected documents or all documents to be updated with the click of the button.



Now click the Disk button in the lower right to save the new button. In addition to adding a specific value to the index field it is possible to add a question mark (?) to any field. This will prompt the user to add a value that will be added to the field.

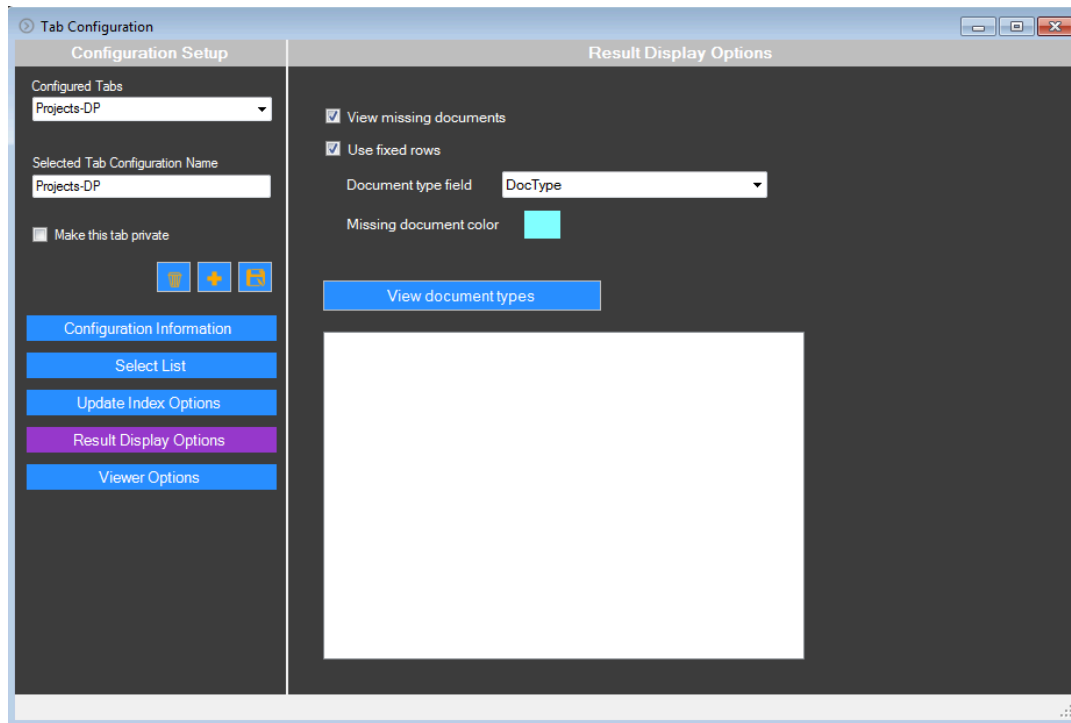
If the COMPLETE Button is clicked all of the items in the Deficiency Manager Result List will be updated.

The screenshot displays the 'Deficiency Manager' application. On the left, there is a sidebar with two panes: 'Company Total = 23' and 'Project Total = 7'. The company list includes BUSCH GARDENS, Construction Maniacs, CREATIVE MACHINES, Creative Machines Ltd., DOCUWARE, Eurox-Fun Park S.A., FLYING TOM (highlighted in blue), FREIZEITPARK MOSER, Imaging Systems, Leisure park Moser, and LEISURE PARTNERS. The project list shows projects 4001 through 4007, with 4006 highlighted in blue. The main pane displays a table titled 'Result List' with columns: Company, Doc.-Type, Date, Project, Status, and Customer Number. A green box highlights the 'Status' column, which contains the word 'complete' for all 12 rows. The table data is as follows:

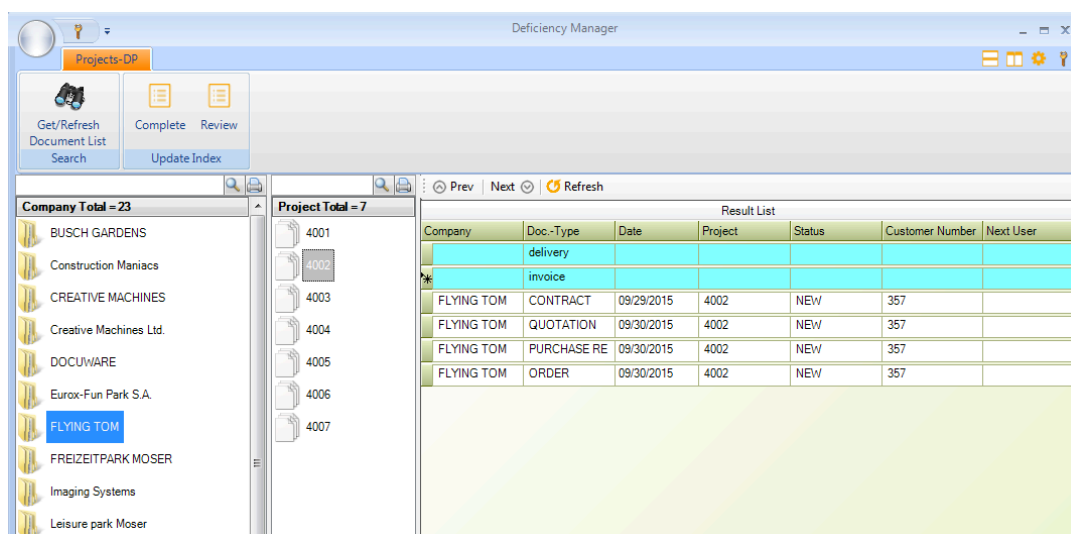
Company	Doc.-Type	Date	Project	Status	Customer Number
FLYING TOM	QUOTATION	09/30/2015	4006	complete	35
FLYING TOM	LETTER	09/30/2015	4006	complete	35
FLYING TOM	PURCHASE RE	09/30/2015	4006	complete	35
FLYING TOM	ORDER	09/30/2015	4006	complete	35
FLYING TOM	CONTRACT	09/29/2015	4006	complete	35
FLYING TOM	INVOICE	09/29/2015	4006	complete	35
FLYING TOM	CONTRACT	09/29/2015	4006	complete	35
FLYING TOM	DELIVERY	09/29/2015	4006	complete	35
FLYING TOM	INVOICE	09/29/2015	4006	complete	35
FLYING TOM	LETTER	09/30/2015	4006	complete	35
FLYING TOM	QUOTATION	09/30/2015	4006	complete	35
FLYING TOM	PURCHASE RE	09/30/2015	4006	complete	35

Result Display

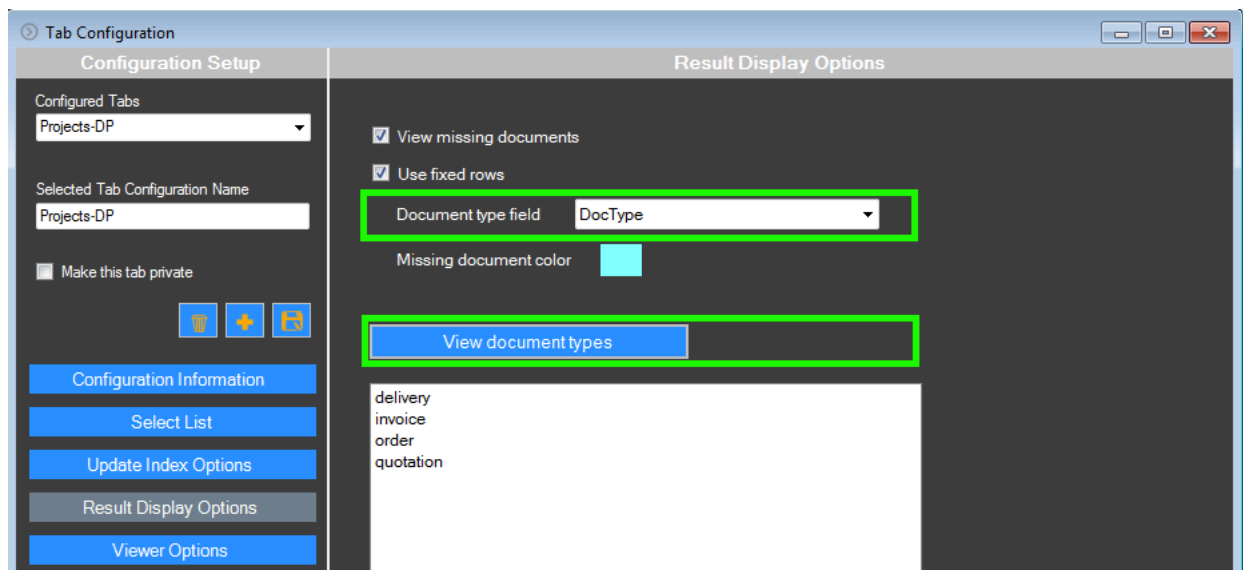
Select the “Result Display Options” Button under the “Configuration Information” button to navigate to the configuration setup for how the documents will be displayed in the Result List.



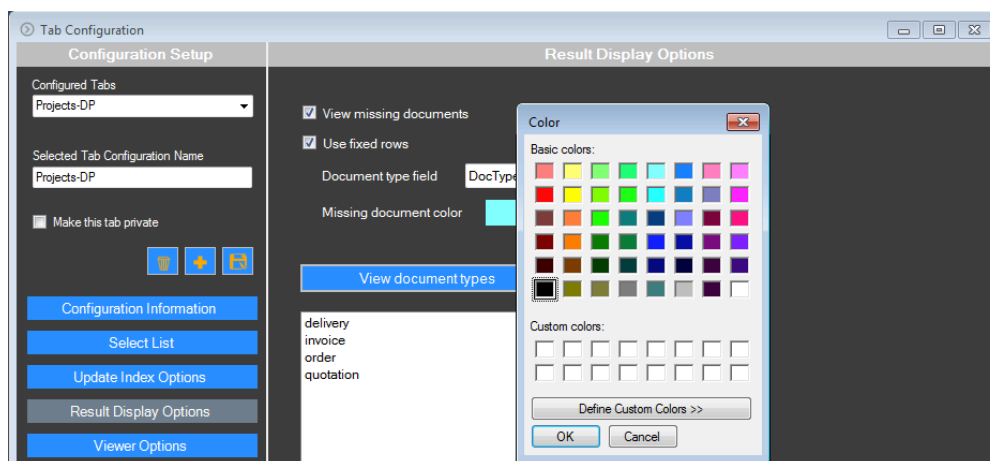
The Check Box for “Use Fixed Rows” will force all of the rows of missing documents to the top of the list so that they can easily be identified.



The “Document Type” field MUST be set for each file cabinet. The Deficiency Manager is designed to highlight missing documents. It accomplishes this by overlaying a DocuWare Fixed Select List against the documents that exist in the file cabinet. Each file cabinet must have a Document Type field but every file cabinet may use a different description for this field. Please select the name of the Document Type for the file cabinet. Then click the “View Document Types” button to see the list of required documents.



The Deficiency Manager has the ability to display the missing documents in one color that can be selected from the color pallet. Click the color swatch, then select a color and click OK.



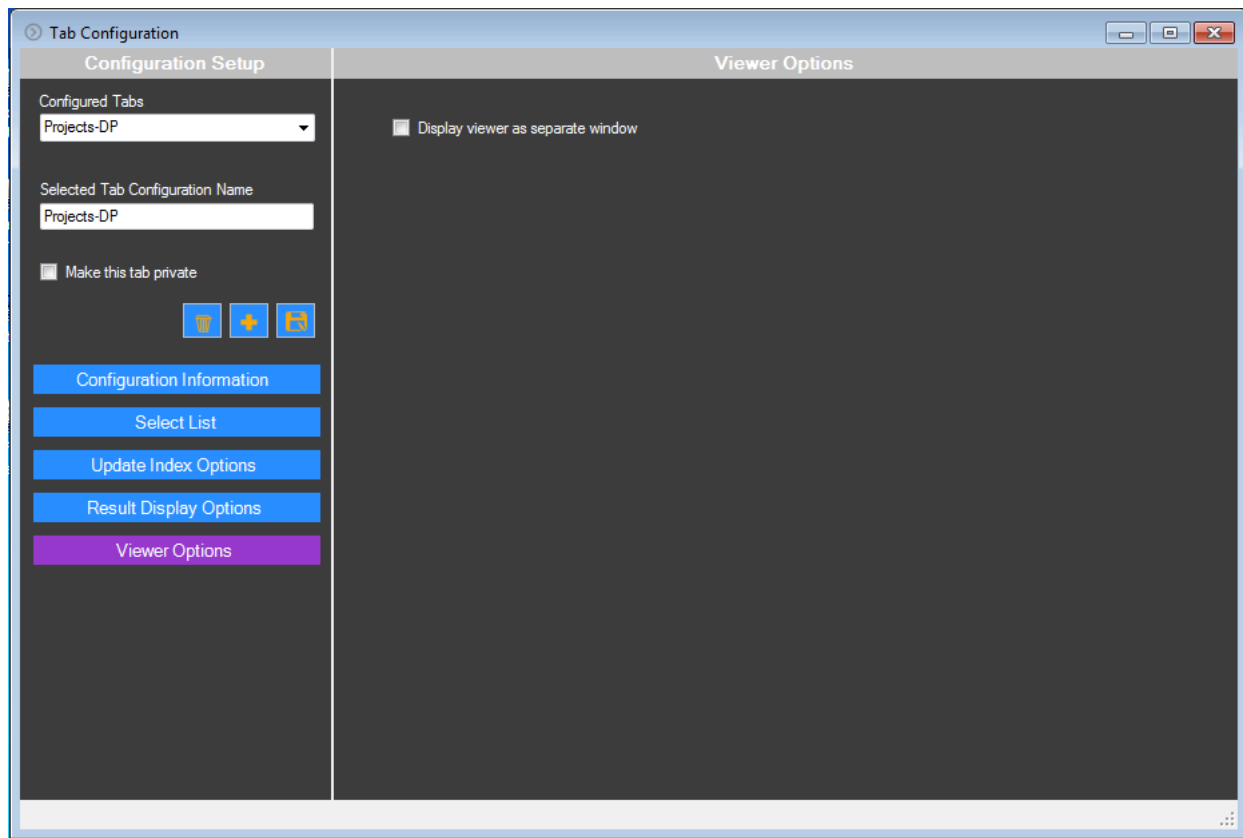
Now you can click the “View Document Types” button to display the select list for this tab.

If the list does not display correctly, please check in DocuWare Administration that the correct Result View has been selected in the Search Dialog as shown on page 31.

Viewer Options

Select the “Viewer Options” Button under the “Configuration Information” button to navigate to the configuration setup for the Viewer.

By selecting the check box for “Display viewer as separate window” the document viewer will display the document in a separate viewer. If the check box is empty the document will appear in the right panel under the result list.



This is the Deficiency Manager configured with the Company name as the grouping select list, the Project Number as the Selective Select list, the “fixed rows” option is selected, and the “Display viewer as separate window” is not selected so the document is shown in the right panel under the result list.

Deficiency Manager

Projects-DP Customer Projects-DP

Get/Refresh Document List Search Complete Review Sales Update Index

Company Total = 20

- BUSCH GARDENS
- Construction Maniacs
- CREATIVE MACHINES
- Creative Machines Ltd.
- DOCUWARE
- FLYING TOM**
- FREIZEITPARK MOSER
- Imaging Systems
- Leisure park Moser
- LEISURE PARTNERS
- Office Landlords
- Perfect Maid Inc.
- PHONE WIZARD
- RAPID TRANSPORT INC
- ROBINSONS REFUGE

Project Total =

- 4001
- 4002**
- 4003
- 4004
- 4005
- ROLLER...

Result List

Company	Doc.-Type	Date	Project	Status	Customer Nu	Next User
	delivery					
	invoice					
FLYING TO	CONTRAC	09/29/2015	4002	NEW	357	
FLYING TO	QUOTATIO	09/30/2015	4002	NEW	357	
FLYING TO	PURCHAS	09/30/2015	4002	NEW	357	
FLYING TO	ORDER	09/30/2015	4002	NEW	357	

Section 1 of 1 Page 1 of 1 Fit Width

Contract for Cleaning, Housekeeping, and/or Janitorial Services

This contract is made between Peters Engineering (hereafter known as the Client) and The Perfect Maid Inc. (hereafter known as the Contractor). The Client desires to have certain cleaning, housekeeping, and/or janitorial services, described below, performed upon the Client's premises located at _____. Therefore, the parties hereby agree as follows:

1. Client shall grant Contractor access to the yard and its surroundings during regular business hours and other mutually agreeable times.
2. Client shall provide for Contractor's use in performance of this contract the following equipment and supplies:

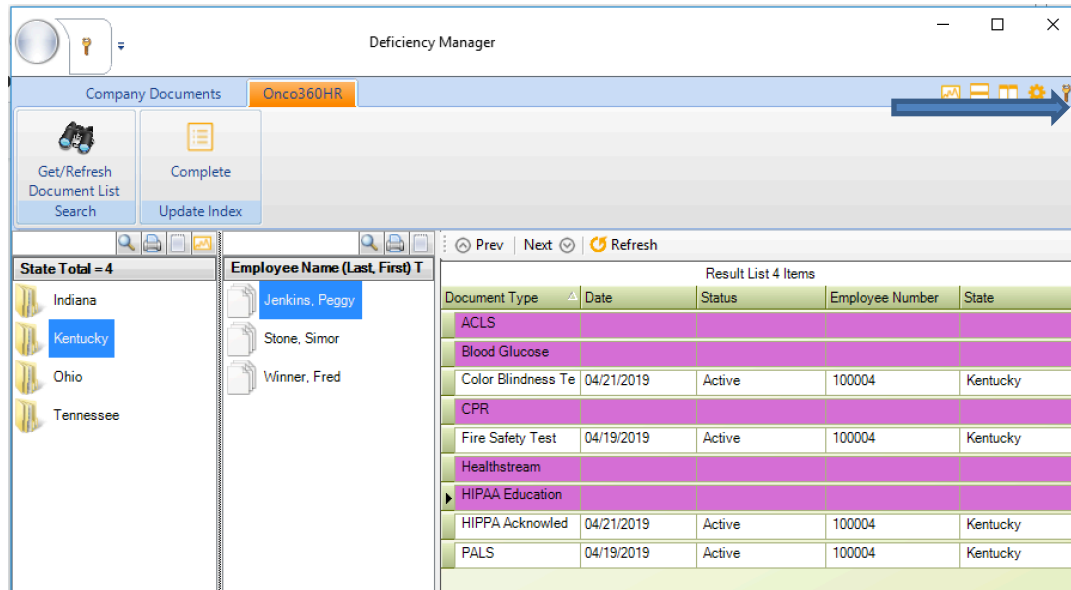
Every field in the Deficiency Manager Result List has an associated Select List. You can access the Select List by Right Clicking the field.

The screenshot displays the 'Deficiency Manager' application window. On the left, there is a sidebar with a tree view showing a hierarchy of companies and projects. The 'Company Total' is 20, and the 'Project Total' is 9. The 'US STEEL' company is selected. The main area shows a 'Result List' table with columns: Company, Doc.-Type, Date, Project, Status, Customer Num, and Next User. A right-click context menu is open over the 'Doc.-Type' field of the row where Project is 99208, showing options like 'quotation', 'delivery invoice', 'order', and 'quotation'. The status of all projects is 'NEW'.

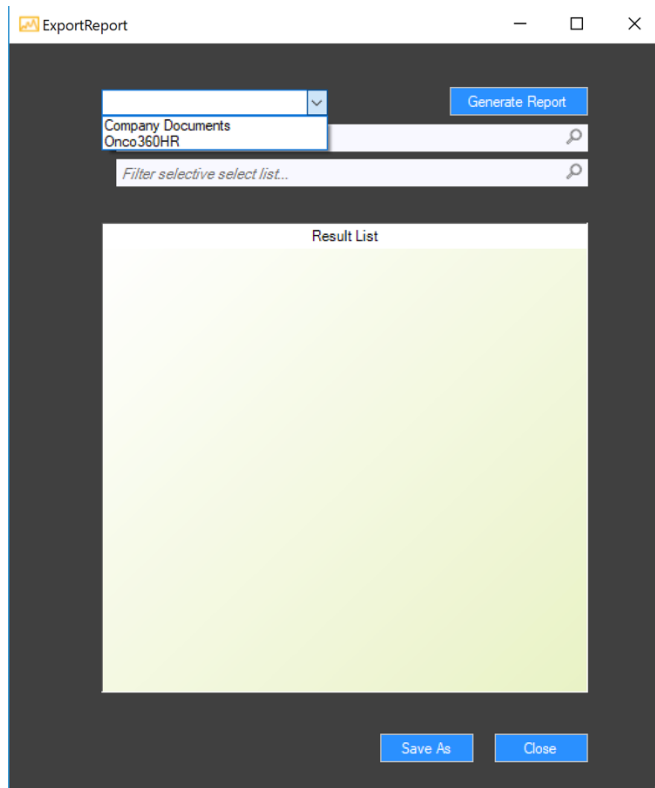
Company	Doc.-Type	Date	Project	Status	Customer Num	Next User
	quotation					
US STEEL	DELIVERY	09/30/2015	99208	NEW	7001	
US STEEL	DELIVERY	09/30/2015	99208	NEW	7001	
US STEEL	Doc.-Type		99208	NEW	7001	
US STEEL	delivery invoice		99208	NEW	7001	
US STEEL	order		99208	NEW	7001	
US STEEL	quotation		99208	NEW	7001	

Creating A Deficiency Report

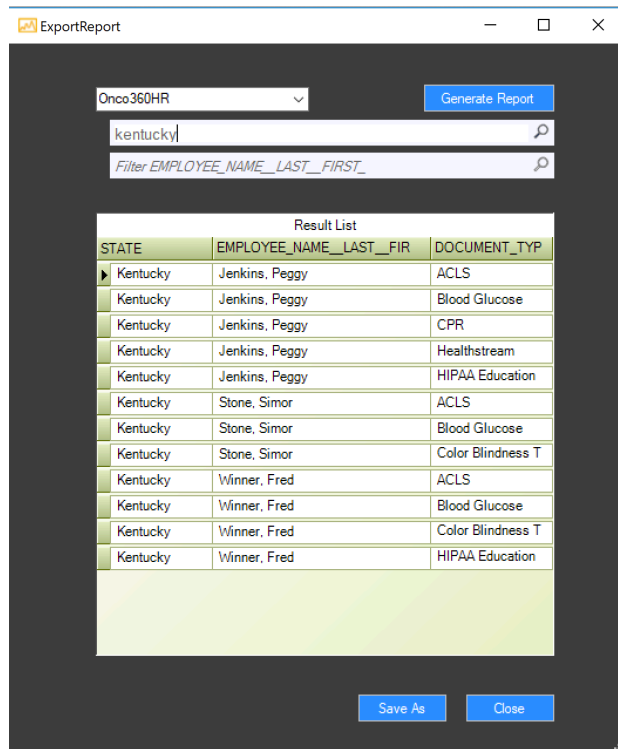
A deficiency report can be created by clicking the Report Icon in the tool bar.



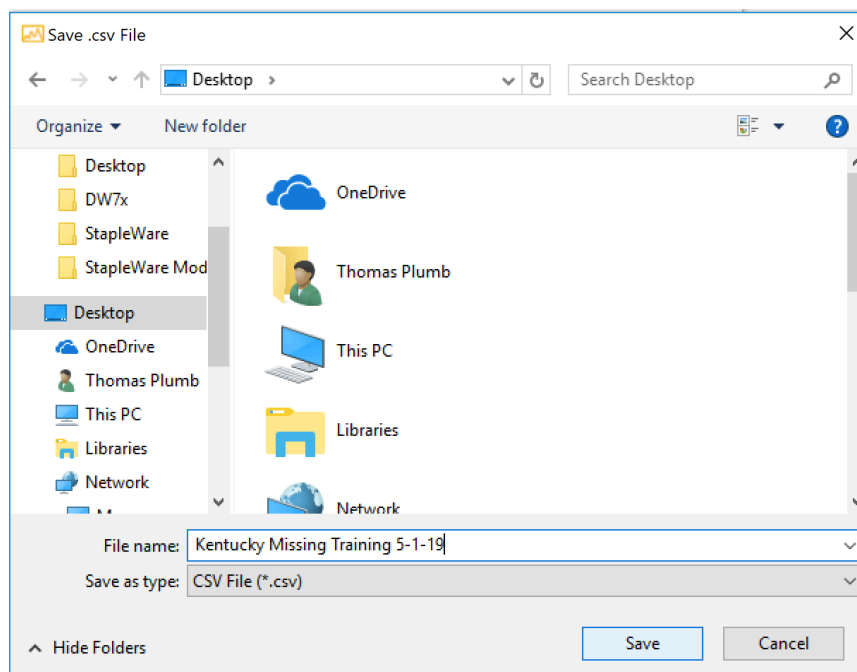
First the user can select the configuration for which the report will be compiled.



The next option is to filter the report for either the Select List group (in this case the STATE) or filter for the Selective Select List group (in this case the Employee Name).



The report can be saved to a CSV file for formatting and summaries.



Feature List

1. Documents missing from a group will display as colored rows at the top of the Result List
2. The Result List may be filtered to show specific documents.
3. Documents may be viewed from the Result List.
4. Result List fields are user selectable.
5. Update all records in a result list with one button.
6. Configurations may be exported and used on another system.
 - a. The location of the “deficiencymanager.settings” file is
“username/Appdata/Roaming/DWaddons/Deficiency Manager/Config”
7. Allows the use of Select Lists to be associated with the same values in the Primary Select List Field. This feature provides for different select lists to be used with different groups of documents.

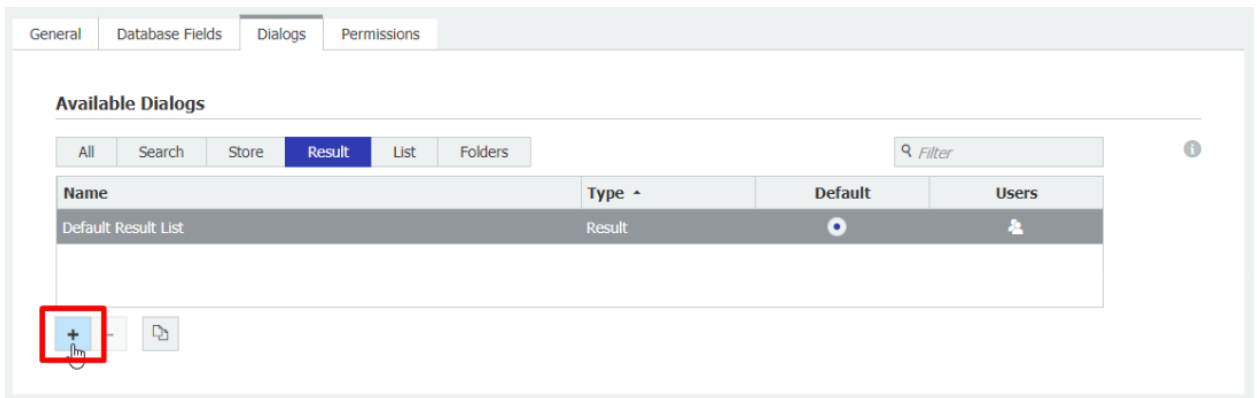
Required Setup in DocuWare Administration PRIOR to Configuring a Tab in Deficiency Manager


Instructions for setting up a Search Dialog to be used on the 'Select List' tab are as follows:

1. Open the File Cabinet configuration wizard from the DocuWare Web Configuration page



2. Create a new Result Dialog from the 'Dialogs' tab of the File Cabinet configuration. Use a name that will allow you to easily identify the correct Result list.





3. Pick which fields to display on the Result List. Click the Index Dialog button, then click the  button to assign a select list. We recommend using the 'Document Type' field.

Configure the Result List

DM-Result

Result Index dialog

Edit the fields of the dialog

Field Name	Field Name in the Dialog	Type	Field contains select list: Default select list	Read Only	
Document Type	Change label	Text		<input type="checkbox"/>	
Company	Change label	Text		<input type="checkbox"/>	

4. Click '+' to create a new select list. If the select list is already defined, check the box next to the list name. Uncheck the 'Default select list' checkbox.

Use	Name	Type	Mode
<input checked="" type="checkbox"/>	DM Select List	single column	fixed
<input type="checkbox"/>	Default select list	single column	internal
<input type="checkbox"/>	Select List - 2	single column	fixed
<input type="checkbox"/>	Select List - 3	single column	external
<input type="checkbox"/>	Contracts Demo	single column	fixed
<input type="checkbox"/>	Contracts Demo Filter	single column	external
<input type="checkbox"/>	Users	single column	internal

☒ The user can only use entries from the select list to set the field

- Click 'OK' to save the Select List then click 'OK' to save the Result Dialog.
- Create a new Search Dialog from the 'Dialogs' tab of the File Cabinet configuration

Available Dialogs

Name	Type	Default	Users
Default Search Dialog	Search	<input checked="" type="radio"/>	

- Pick which fields to display then click the button to assign a select list. Use the same field as was used in the Result Dialog.

Configure a Search Dialog

DM Search

Edit the fields of the dialog

Field Name	Field Name in the Dialog	Type	Field contains select list: Default select list	Redefi...	Read O...	
Document Type	Change label	Text	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Company	Change label	Text	<input type="checkbox"/>		<input type="checkbox"/>	

- Check the box next to the Select List you'd like to use and uncheck the 'Default select list'

<div> <div>All</div> <div>Internal</div> <div>Fixed</div> <div>External</div> </div> <div>Filter</div>			
Use	Name	Type	Mode
<input type="checkbox"/>	Default select list	single column	internal
<input checked="" type="checkbox"/>	DM Select List	single column	fixed
<input type="checkbox"/>	Select List - ?	single column	fixed

9. Click 'Ok' to save the Select List

10. Scroll to the bottom of the Search Dialog configuration window, click 'More options', and assign 'DM Result' to the Result list dropdown.

[^ Less options](#)

Result list Choose which result list to use for this search

[Create a new result list](#)

DM Result

ID 62498c1f-a66d-4519-9a70-48c6b325e1d1

11. Click 'Ok' to save the Search Dialog then 'Save' to save all changes

The select lists are now configured and ready to be used by the Deficiency Manager. To find out how to use the Variable Search Dialogs option, please continue reading.



Recommended Setup in DocuWare Administration for use with the “Use Variable Search Dialog” check box in Deficiency Manager

The reason that the Variable Search Dialog check box has been added to the Deficiency Manager is to allow the user to see a different Document Type Select List for every group of documents that they are viewing. For example, every State in the United States has laws governing the type of documents that are required for home loans. The administrator may set up 50 Tabs in the Deficiency Manager, each with its own Select List configuration for the required documents. By selecting the “Use Variable Search Dialog” check box the administrator can create **one tab** with all of the 50 States shown as folders in the left column. The Selective Select List column then, contains the grouping field, the STATE. A Search Dialog can be assigned to every State so that when one of the folders on the left is clicked, the relevant documents for that state will be compared to the actual documents in the customer folder.

Another example would be that a company that needs to understand which employees have Training/Certification documentation where each state has a different set of required documents for training. To set up the Deficiency Manager for this example, there will be four states, Indiana, Kentucky, Ohio and Tennessee.

1. Indiana requires the following
 - a. Blood Glucose
 - b. Color Blindness Test
 - c. Competency Program
 - d. Compliance Acknowledgement
 - e. CPR
 - f. Emergency Codes
 - g. Fire Safety Test
 - h. HealthStream
 - i. OSHA Compliance
2. Kentucky requires the following
 - a. ACLS
 - b. Blood Glucose
 - c. Color Blindness
 - d. CPR
 - e. Fire Safety Test
 - f. Healthstream
3. Ohio requires the following
 - a. Emergency Codes
 - b. Fire Safety Test
 - c. HIPAA Education Quiz
 - d. Performance Review
 - e. Training Certificate
4. Tennessee Requires the following
 - a. ACLS
 - b. Blood Glucose

- c. Color Blindness
- d. Confidentiality Statement
- e. CPR
- f. Fire Safety Test
- g. FMLA
- h. Healthstream
- i. Orientation Checklist
- j. PALS
- k. Security Policies Acknowledgement
- l. Skills Verification
- m. Travel Policy

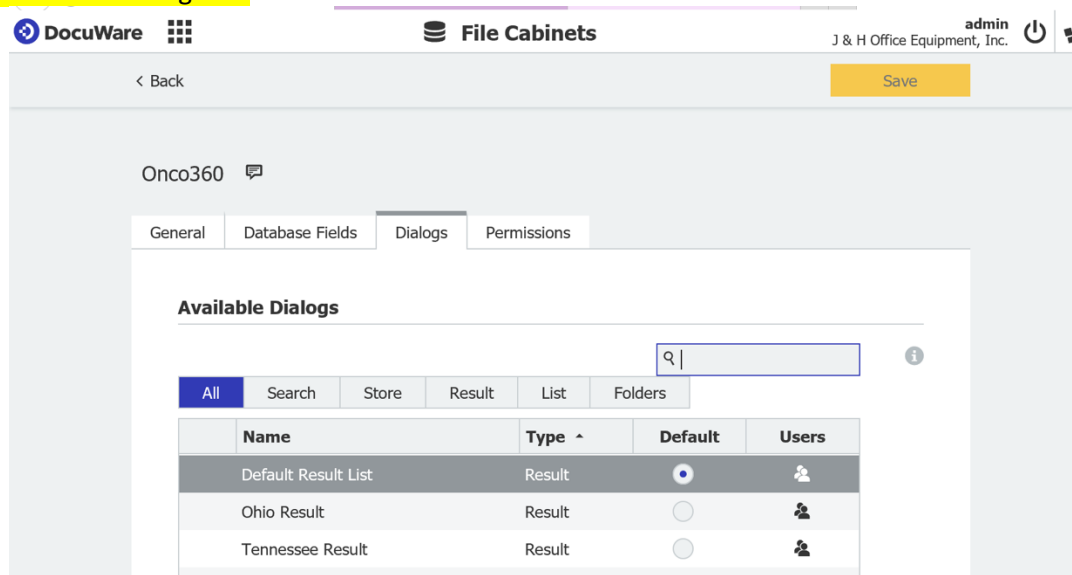
Quick Steps:

The following steps are required to allow the select lists for each state to be applied based on the folder that is selected. The Select Lists will be created in the Index dialog of the Result List.

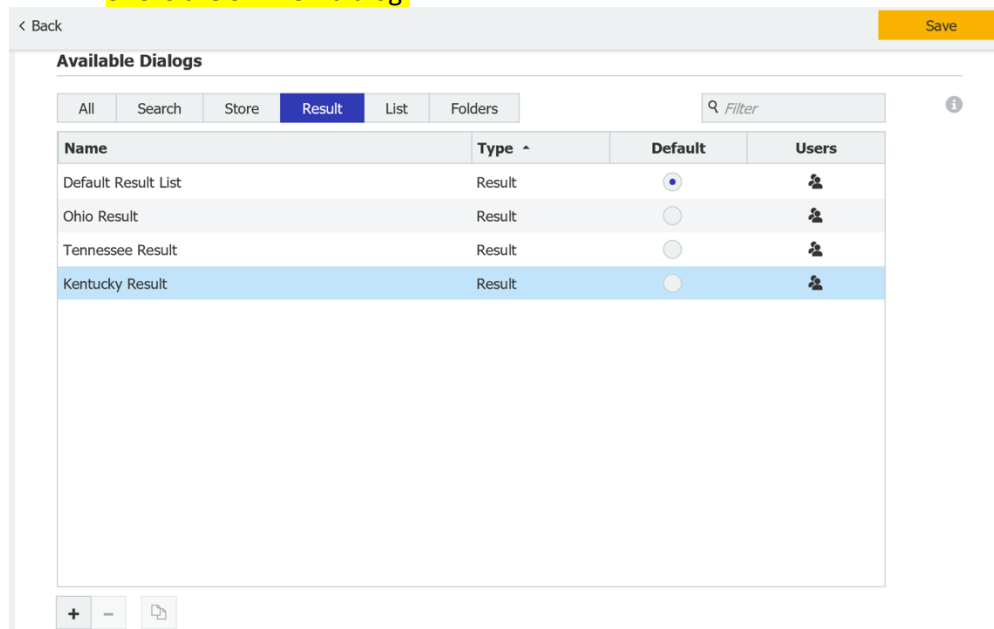
1. In the DocuWare Configuration find the file cabinet that will be used and click the Pencil icon to edit the file cabinet.
2. Click the Dialogs tab
3. Click the Result Tab
 - a. Scroll down to click the PLUS sign (+) to add a new RESULT dialog for the first state and name it with the State name and the word 'Result' (Ohio Result). This will be important because there will be two entries in the dialogs list and it is important to know which one is the RESULT dialog and which one is the SEARCH dialog.
 - b. With the Result button selected, select the fields that will appear in the Deficiency Manager Result. Usually 4 or 5 fields is enough to identify the documents.
 - c. Click the Index Dialog and navigate to the Document Type field and double click the Select List Icon.
 - d. Select FIXED and add the document types that will be required for this State (in this case OHIO).
 - e. Click SAVE to save the Select List and then Click SAVE to close the New RESULT dialog
4. Click the Search Tab
 - a. Scroll down to click the PLUS sign (+) to add a new SEARCH dialog list for the first state and name it with the State name and the word 'Search' (Ohio Result).
 - b. Navigate to the Document Type field and double click the Select List icon.
 - c. Click the check box next to the Select list that was created for this State (in this case OHIO).
 - d. Uncheck any other Select Lists (ie. Default Select List must be unchecked)
 - e. Scroll down in the Search Dialog and click "More Options"
 - f. Select the Result dialog that corresponds to this Search dialog (in this case Ohio Search)
 - g. Click OK to save the settings and Click SAVE to save the new Result dialog
5. Repeat steps 3 & 4 to add a Result dialog and a Search dialog for each State.

Steps including illustrations:

1. In the DocuWare Configuration find the file cabinet that will be used and click the Pencil icon to edit the file cabinet.
2. Click the Dialogs tab



3. Click the Result Tab
 - a. Scroll down to click the PLUS sign (+) to add a new RESULT dialog for the first state and name it with the State name and the word 'Result' (Indiana Result). This will be important because there will be two entries in the dialogs list (Indiana Search and Indiana Result) and it is important to know which one is the RESULT dialog and which one is the SEARCH dialog.



Configure the Result List

Indiana Result

Result Index dialog

Edit the fields of the dialog

Field Name	Field Name in the Dialog	Type	
Document Type	<i>Change label</i>	Text	👁
Date	<i>Change label</i>	Date	👁
Email	<i>Change label</i>	Text	👁
Status	<i>Change label</i>	Text	👁
Document Number	<i>Change label</i>	Text	👁
Employee Name (Last, First)	<i>Change label</i>	Text	👁
Employee Number	<i>Change label</i>	Text	👁

Cancel

OK

- With the Result button selected, select the fields that will appear in the Deficiency Manager Result. Usually 4 or 5 fields is enough to identify the documents.
- Click the Index Dialog and navigate to the Document Type field and double click the Select List Icon.

Configure the Result List

Indiana Result

Result Index dialog

Edit the fields of the dialog

Field Name	Field Name in the Dialog	Type	Field contains select list: Default select list	
Document Type	<i>Change label</i>	Text	☰	👁
Date	<i>Change label</i>	Date	☰	👁
Email	<i>Change label</i>	Text	☰	👁
Status	<i>Change label</i>	Text	☰	👁
Document Number	<i>Change label</i>	Text	☰	👁
Employee Name (Last, First)	<i>Change label</i>	Text	☰	👁
Employee Number	<i>Change label</i>	Text	☰	👁

Cancel

OK


- d. Select the Edit icon (pencil on the right) to add values to the FIXED Select and add the document types that will be required for this State (in this case Indiana). It is also possible to use the Internal and External lists. For External Lists you must create a File Connection in DocuWare Administration.

Change properties of the dialog field "Document Type"

Choose select lists for the DocuWare Client or create new ones

All Internal Fixed External

Q |

Use ▾	Name	Type	Mode	
<input checked="" type="checkbox"/>	Default select list	single column	internal	⬆
<input checked="" type="checkbox"/>	Indiana	single column	fixed	

Edit select list - Indiana

Indiana

Type ☒ Fixed ☐ External



Select list entries

Blood Glucose
Color Blindness Test
Competency Program
Compliance Acknowledgement
CPR
Emergency Codes


Cancel

OK


- e. Click OK to save the Select List and then Click OK and click SAVE to close the New RESULT dialog

4. Click the Search Tab

- Scroll down to click the PLUS sign (+) to add a new SEARCH dialog list for the State and name it with the State name and the word 'Search' (Indiana Search).


DocuWare  File Cabinets J & H Office Equipment ^a

< Back Save



Onco360 




General Database Fields **Dialogs** Permissions

Available Dialogs



All **Search** Store Result List Folders















Name	Type ^	Default	Users
Default Search Dialog	Search	<input checked="" type="radio"/>	
Ohio Search	Search	<input type="radio"/>	

Configure a Search Dialog

Indiana Search 

Edit the fields of the dialog

Field Name	Field Name in the Dialog	Type	Selec...	Pred...	Read...	
Document Type	<i>Change label</i>	Text			<input type="checkbox"/>	 
Date	<i>Change label</i>	Date			<input type="checkbox"/>	
Email	<i>Change label</i>	Text			<input type="checkbox"/>	
Status	<i>Change label</i>	Text			<input type="checkbox"/>	
Document Number	<i>Change label</i>	Text			<input type="checkbox"/>	
Fulltext	<i>Change label</i>	Text			<input type="checkbox"/>	
Employee Name (Last, First)	<i>Change label</i>	Text			<input type="checkbox"/>	

Cancel

OK

- b. Navigate to the Document Type field and double click the Select List icon.

Configure a Search Dialog

Indiana Search



Edit the fields of the dialog

Field Name	Field Name in the Di...	Type	Sele...	Pred...	Rea...	
Document Type	<i>Change label</i>	Text			<input type="checkbox"/>	
Date	<i>Change label</i>	Date			<input type="checkbox"/>	
Email	<i>Change label</i>	Text			<input type="checkbox"/>	
Status	<i>Change label</i>	Text			<input type="checkbox"/>	
Document Number	<i>Change label</i>	Text			<input type="checkbox"/>	
Fulltext	<i>Change label</i>	Text			<input type="checkbox"/>	
Employee Name						

Cancel

OK

Change properties of the dialog field "Document Type"

All	Internal	Fixed	External	<input type="text" value="Filter"/>
Use	Name	Type	Mode	
<input checked="" type="checkbox"/>	Default select list	single column	internal	
<input type="checkbox"/>	Users	single column	internal	
<input type="checkbox"/>	Roles	single column	internal	
<input type="checkbox"/>	Groups	single column	internal	
<input type="checkbox"/>	Substitution lists	single column	internal	
<input type="checkbox"/>	Employee+	multi-column	external	
<input type="checkbox"/>	Departments	single column	external	



[Show filter configuration](#)

Cancel

OK

- c. Click the check box next to the Select list that was created for this State (in this case Indiana).

Change properties of the dialog field "Document Type"

CHOOSE SELECT LISTS FOR THE DOCUMENTWARE CLIENT OR CREATE NEW ONES

All Internal Fixed External

Filter

Use	Name	Type	Mode
<input type="checkbox"/>	DM Doc Types	single column	fixed
<input type="checkbox"/>	Onco-Select-List	single column	fixed
<input type="checkbox"/>	Onco-All-DT	single column	fixed
<input type="checkbox"/>	Ohio	single column	fixed
<input type="checkbox"/>	Tennessee	single column	fixed
<input type="checkbox"/>	Kentucky	single column	fixed
<input checked="" type="checkbox"/>	Indiana	single column	fixed

+

☐ The user can only use entries from the select list to set the field

Show filter configuration

Cancel

OK

- d. Uncheck any other Select Lists (ie. Default Select List must be unchecked), click OK.
e. Scroll down in the Search Dialog and click "More Options"
f. Select the Result dialog that corresponds to this Search dialog (in this case Indiana Search)

Configure a Search Dialog

Employee Name (Last, First)	Change label	Text	≡	<input type="checkbox"/>	👁
Employee Number	Change label	Text	≡	<input type="checkbox"/>	👁
State	Change label	Text	≡	<input type="checkbox"/>	👁
Classification	Change label	Text	≡	<input type="checkbox"/>	👁
Expiration Date	Change label	Date	≡	<input type="checkbox"/>	👁

^ Less options

Result list Choose which result list to use for this search

Create a new result list

ID 9d1a52ea-0afd-4506-9bc6-f4bcb78c

- Default Result List
- Ohio Result
- Tennessee Result
- Kentucky Result
- Indiana Result

Cancel

OK

- g. Click OK to save the settings and Click SAVE to save the new Result dialog
5. Repeat steps 3 & 4 to add a Result dialog and a Search dialog for each State.

- In the Deficiency Manager configuration tool the use of the question mark with the word 'Search' (? Search) in the "Variable Search" text box will then use these dialogs when each State is selected in the left column of the Deficiency Manager. Please note that the State MUST be the SELECT LIST FIELD in the Deficiency Manager setup and the Employee Name is the Selective Select List.

Tab Configuration

Configuration Setup

Configured Tabs: Onco360HR

Selected Tab Configuration Name: Onco360HR

☐ Make this tab private

Select List

Select file cabinet: Onco360

Search dialog: Default Search Dialog

Select list field: State

☒ Use variable search dialog

☐ Use system field

☒ Use selective select list

Selective select list field: Employee Name (Last, First)

Filters: ☐ Do not filter result grid results

Employee Number: [Text Box]

Document Type: [Text Box]

Classification: Training/Education

Date: [Text Box] - [Text Box]

Email: [Text Box]

Status: [Text Box]

Document Number: [Text Box]

Expiration Date: [Text Box] - [Text Box]

Deficiency Manager

Company Documents: Onco360HR

Get/Refresh Document List | Complete | Search | Update Index

State Total = 4

- Indiana
- Kentucky
- Ohio
- Tennessee

Employee Name (Last, First)

- Jenkins, Peggy
- Stone, Simor
- Winner, Fred

Result List 4 Items

Document Type	Date	Status	Employee Number	State
HIPAA Acknowledge	04/21/2019	Active	100004	Kentucky
Color Blindness Test	04/21/2019	Active	100004	Kentucky
PALS	04/19/2019	Active	100004	Kentucky
Fire Safety Test	04/19/2019	Active	100004	Kentucky
ACLS				
Blood Glucose				
CPR				
Emergency Codes				
Healthstream				
HIPAA Education Qu				

AUTHENTICATED [admin (J & H Office Equipment, Inc.)] CONFIGURATION [Onco360HR] HOST [http://presentationvm:80/docuware/platform]

Product name: Deficiency Manager
Product version: [6.45.310.0]
RTM version: [6.43.96.1416]

Support:
Company: J&H Inc.
Email: dwsupport@jhoee.com
Phone: 1+(888) 586-3103

In this application, when no documents exist for any list, an entry will appear showing a missing document. Employee “Joe” has an application but is missing “W4”, Employee Larry has a “W4” and Employee Steve has no documents but still shows the required missing document of “W4”. ****NOTE**** Department column AND Employee columns are fixed entry select lists, so documents don’t have to exist for those to show as selectable values.

