DocMoto
Tracking, Reporting & Auditing

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Introduction:

DocMoto has many tools to enable users to track a documents life-cycle, generate audit information, list transactions within the system over a specific timeframe and track tasks.

This document guides users through changes to their DocMoto Client Preferences and specific feature & functions.
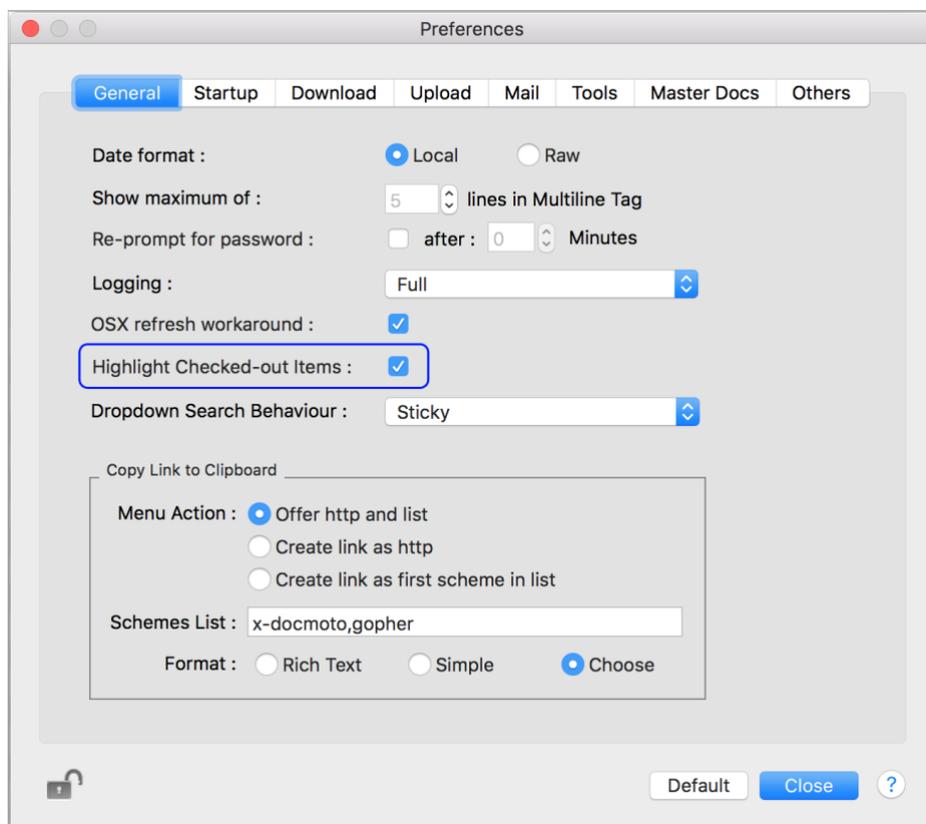
DocMoto Client Preferences:

Users can change their DocMoto Client preference so any documents **"Checked-Out"** to them will be highlighted in **bold** and other users **"Checked-Out"** documents will be set in a greyed-out font.

To change the DocMoto Client preferences:

1. Select **"Preferences"** from the **"DocMotoClient"** menu.
2. Ensure the **"General"** tab is selected.
3. Select the **"Highlight Checked-out Items"** check box. As shown below in <u>Fig. Highlight Checked-Out Items</u>.
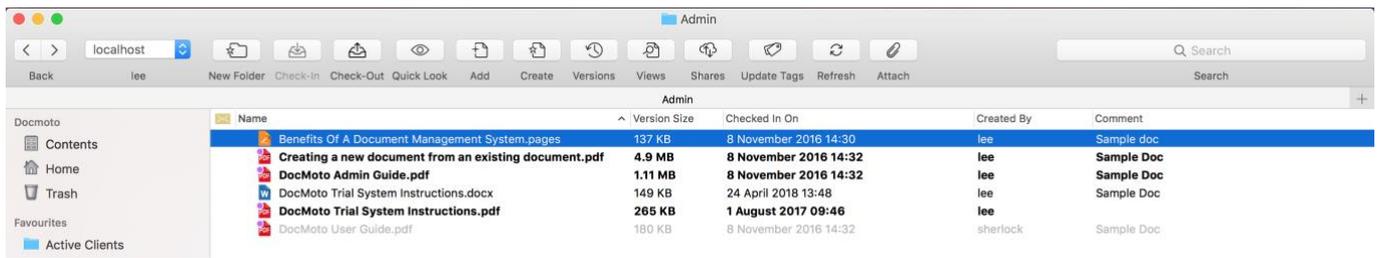
Fig. Highlight Checked-Out Items

Result/Output from DocMoto Client preference change

The user will now see documents **"Checked-Out"** to them in **bold** and documents **"Checked-Out"** to other users in greyed-out font. As shown below in <u>Fig. Checked-Out documents</u>

Fig. Checked-Out documents

[Fig. Checked-Out documents](#) above illustrates the standard views in DocMoto. The **"Views"** function will be covered in a later section of this document.

Views

DocMoto's saved searches have been adapted to create realtime views. Views can be specific to a user or global (across the whole user group) and are portable i.e. will be available no matter where the user logs in.

To create a view a user must first conduct a search based upon a keyword. A keyword can be:

- Folder or File name – search will automatically list all files and folders matching the keyword.
- Content – content is not automatically listed. However, if a user types in a term/word and selects return, DocMoto will automatically search content. **Note:** DocMoto will issue the search under all possible conditions (see below) but users can refine the criteria if necessary.
    - All Words – Returns a match when a file contains all the specified words.
    - Any Word – Returns a match when a file contains any of the specified words.
    - Phrase – Matches the entire phrase.
    - Advanced – Use spotlight query syntax to define the criteria.
- Tag name – search will automatically list all tags within the system matching the keyword.

An example of how to create a **"View"** is shown below. This example is based on a realtime view of all files currently **"Checked-Out"** and who has them **"Checked-Out"**.

Creating a view example:

1. Type a keyword into the search user interface. In this example, the user has chosen **"Checked"** as the search term. DocMoto presents a list of files, folders and tags which contain (or matches) the search term.
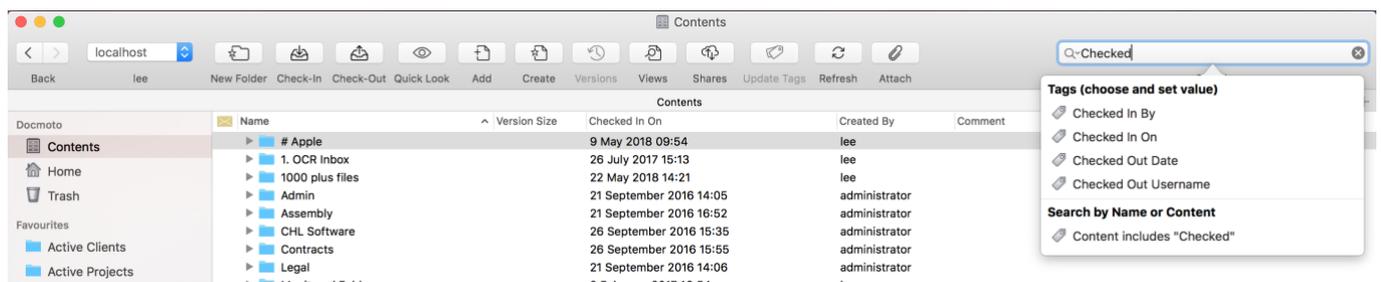

2. Select the base criteria for the search from the dropdown predictive list. As soon as the criteria is chosen DocMoto automatically loads it into the search engine. In this example, **"Checked Out Username"** has been selected. **Note:** Any search involving the user group will include the default option of **"<Any User>"**. This option enables users to conduct searches matching any user within the group.
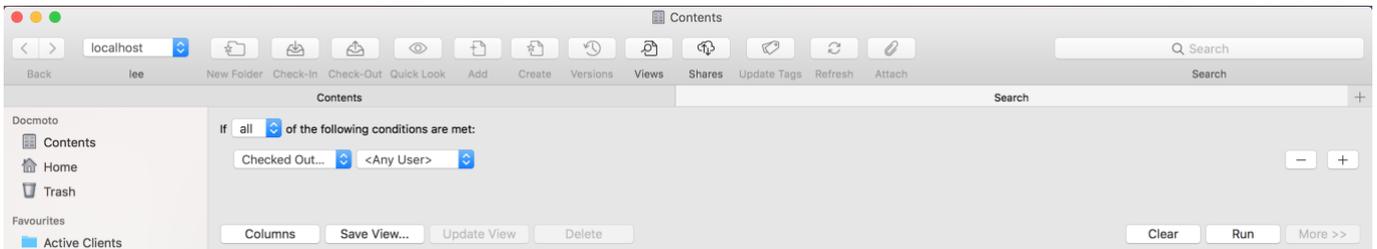
3. Select **"Columns"** from the search panel. A dialog is presented enabling the user to add or remove columns accordingly.
4. Select the **"+"** button from the **"Display Columns"** dialog.
5. Navigate to the **"Checked Out Username"** option and select the check-box. Select **"OK"** to add.
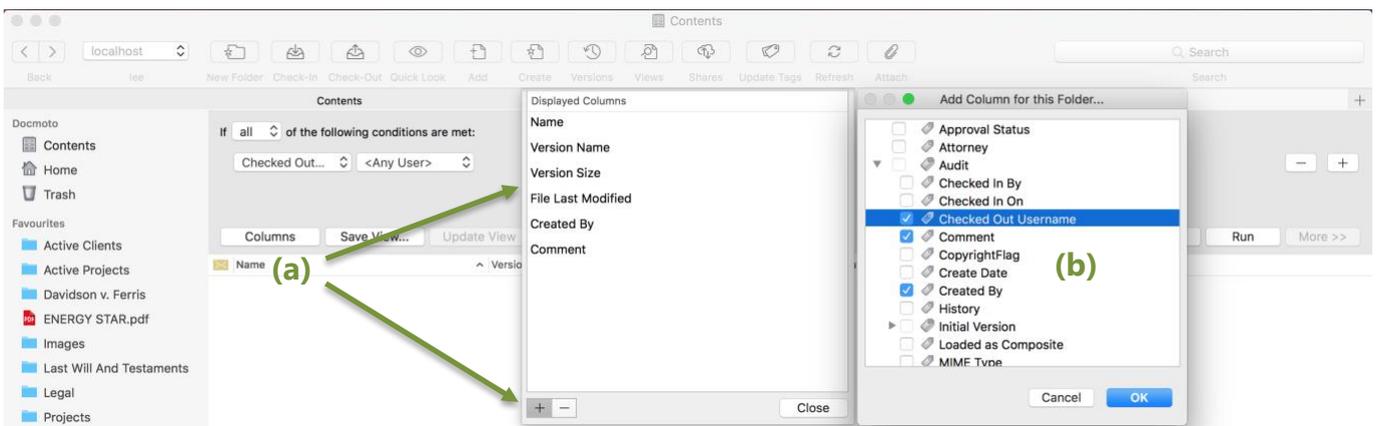
(a) Displayed columns can be removed or added. Users can drag the columns up and down the dialog in order of preference.
(b) Tags the user can add.
6. Select **"Close"** to confirm the displayed columns.
7. Select **"Rub"** to execute the search.
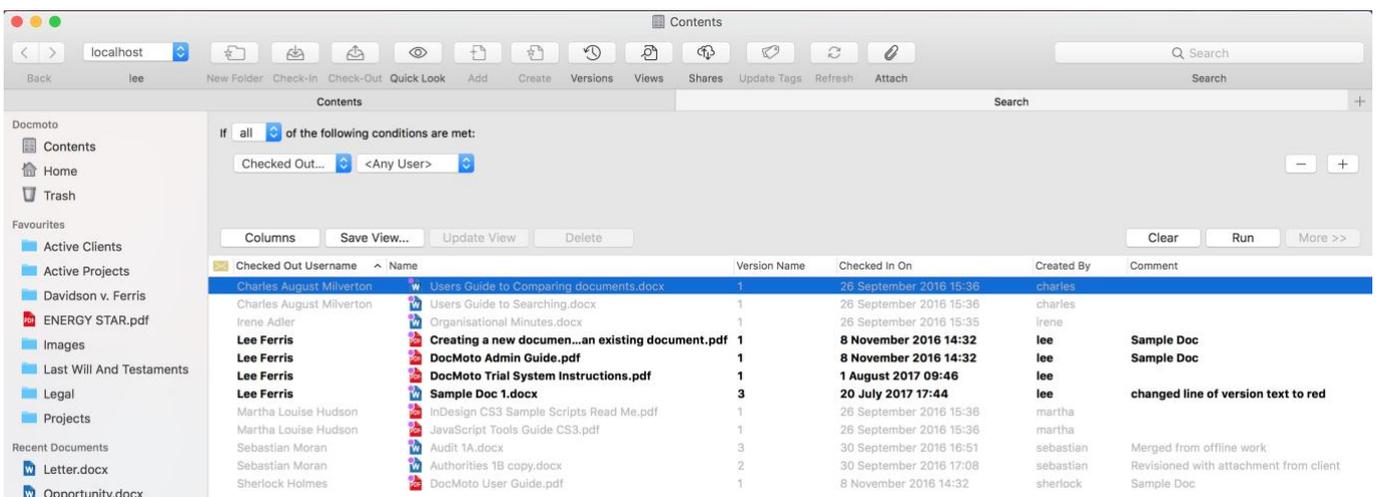
Note: The user running this search has configured their DocMoto Client so that his **"Checked Out"** files are displayed in a **bold** font whereas other users **"Checked Out"** files are displayed in greyed-out font. The columns have been adjusted so that the first column reflects who has the document **"Checked Out"** and is sorted via this column.

8. Select **"Save View"**. The user has the option to label the view and give it scope. In this example the view will be labelled **"Checked Out to Anyone"** and given a scope of **"Shared by everyone"**.

Note: Only administrators can give **"Views"** scope.
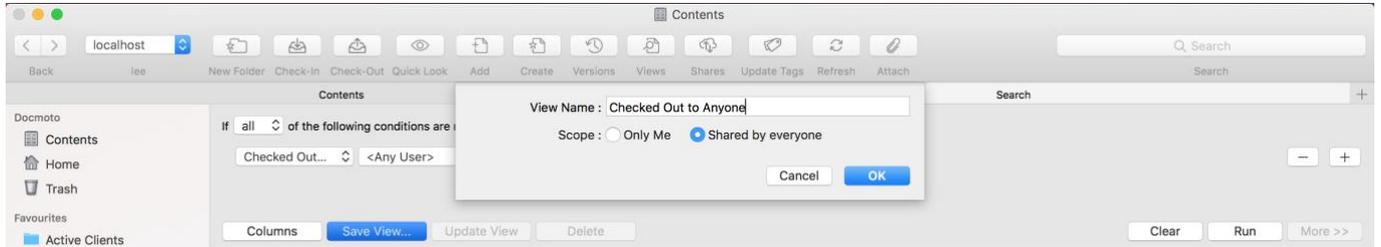
9. Select the **"OK"** button to save the view.

The view **"Checked Out to Anyone"** will now be available to all DocMoto users via the **"View"** button on the toolbar.
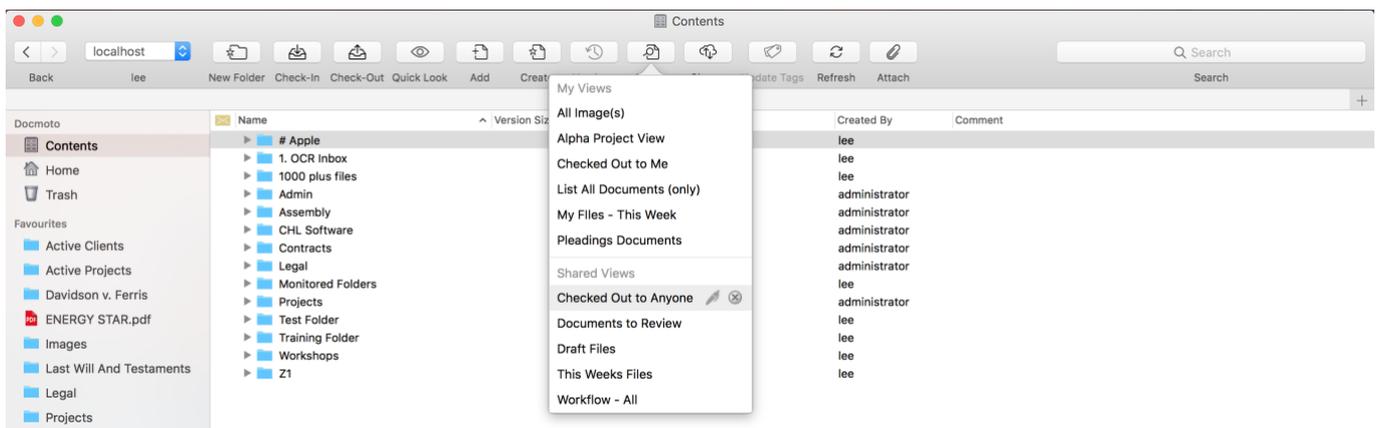
Additional Note: If the user selects their user name **step 2** (above) the **"View"** created will be documents that are **"Checked Out"** to them. If the user saves the **"View"** as **"Checked Out to ME"** it will be listed under **"My Views"** and accessible at all times.

Reports

DocMoto has a sophisticated built-in reports system. Designed specifically to provide essential management information, the reporting feature is another tool to help increase efficiency, improve customer service and drive down costs. There is a technical article on our website illustrating how a report can give users an overview of the documents that need action at any given time – click here to view the article.

The next section will cover a custom report and some of the standard reports shipped with DocMoto.

Example Reports

Reports are accessed and subsequently run through the menu item **"Reports"**. See Fig. Reports List below.

Fig. Reports List
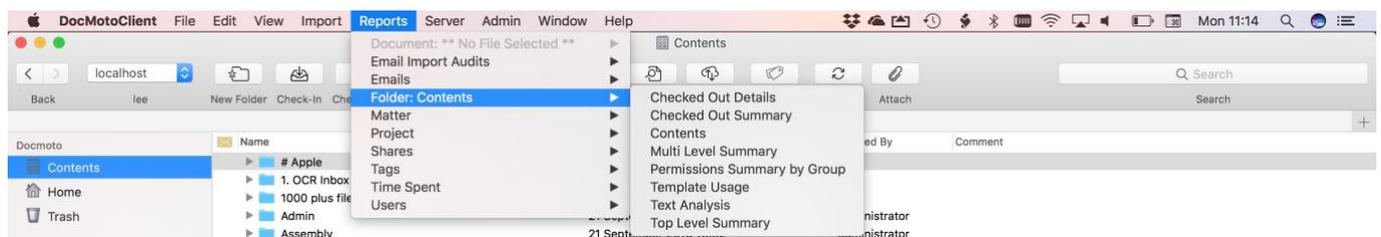
To run a report:

1. Select **"Reports"** menu item. Reports are sectioned into categories:
    a. Document
    b. Emails
    c. Folders
    d. Etc...
2. Select one of the reports listed. **Note:** Some of the reports will require users to select parameters before running the report.
3. A report will be created.

The next section details two (one custom, one standard) examples:

1. Matter Status (custom)
2. Activity Details (standard)
3. Document – Activity Details (standard)
4. Tags – Usage Summary (standard)
5. Checked Out Details (standard)
6. Checked Out Summary (standard)

Matter Status – Report

(a) Location of the matter within DocMoto.

(b) Type of matter – Elder Law, Estate Planning, Mediation, Guardian ad Litem, Corporate, Litigation, Intellectual Property, Estate Administration Probate.

(c) Status – Open or Closed.

(d) Attorney assigned to case.

(e) Parameters:

- Folder – location in DocMoto where the report is run.
- Matter Type – see point **(b)** above.
- Matter Status – see point **(c)** above.
- Attorney – list of attorneys.

Note: The parameters in this report support wildcards. By default, the **"Matter Type"**, **"Matter Status"**, **"Attorney"** parameters are set to **"%"**. The **"%"** wildcard is a substitute for zero or more characters. This ensures all **"Matter Types"**, **"Matter Status"**, **"Attorneys"** are listed when the report is first run. An example of wildcard use can be seen below.

Matter Status – Report (using wildcards)
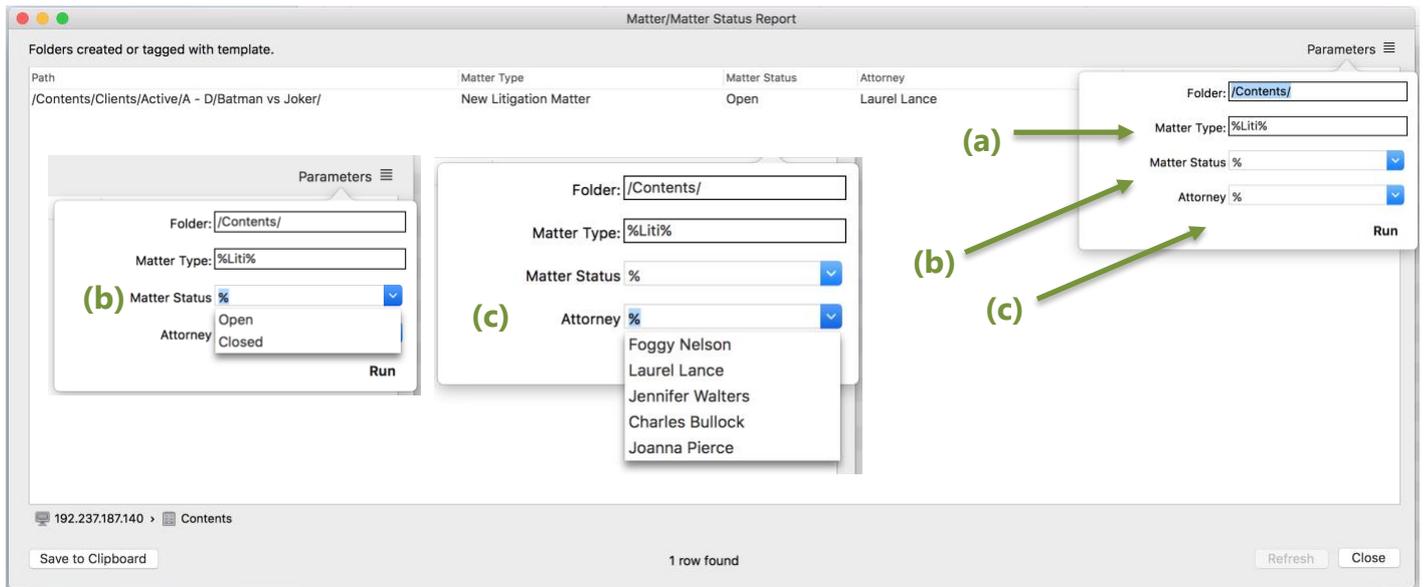
(a) The wildcard **"%"** has been placed either side of the term **"Liti"** therefore matching any **"Matter Type"** with the characters **"Liti"**. i.e. **"New Litigation Matter"**.

(b) Selectable list - **"Matter Status"** or user defined by typing terms with or without wildcards.

(c) Selectable list - **"Attorney"** or user defined by typing terms with or without wildcards.

Activity Details – Report

Located under the **"Reports/Users/Activity Details"** menu.
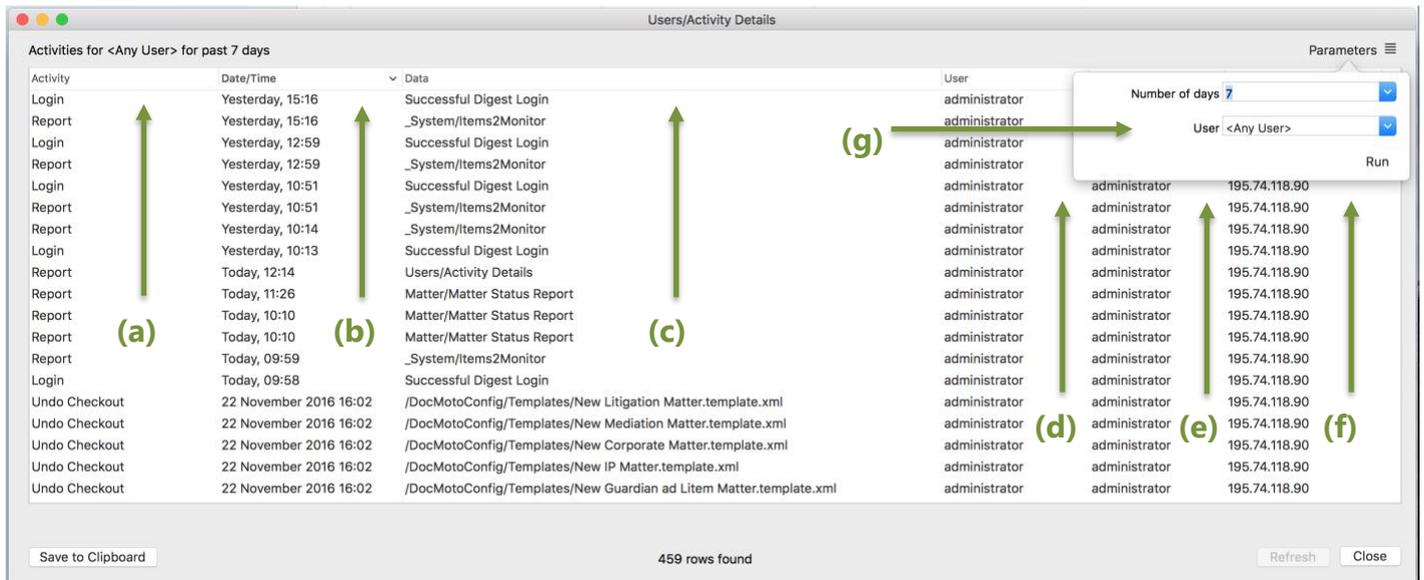
(a) Activity **–** Illustrates the action or activity the user has performed.

(b) Date/Time – Date & Time the activity was undertaken.

(c) Data – Data set (and location) the user has worked on.

(d) User – User who carried out the activity.

(e) Real Name – Full name of the user for audit purposes.

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(f) User's IP Address – Computer where the transaction took place.
(g) Parameters:

- Number of days – The number of days and subsequent transactions to base the report on.
- User – Selectable list of users. The user to base the report on. **Note:** Any search of report in this case involving the user group will include an option of **"<Any User>"** as the criteria.

Document – Activity Details

Note: This menu option is only available when a document is selected.
Located under the **"Reports/Document: <name_of_document>/Activity Report"** menu item.

(a) Date/Time – Date & Time the activity was undertaken.
(b) Activity **–** Illustrates the action or activity the user has performed.
(c) User – User who carried out the activity.
(d) User's IP Address – Computer where the transaction took place.
(e) Location – The location of the document.

Tags – Usage Summary

Located under the **"Reports/Tags/Usage Summary"** menu.

(a) Name – User defined Tag Name.
(b) Value – The value assigned to the tag.
(c) Count – Number of occurrences the tag and value has been set within the system.
(d) Details – Interactive link to get more details on the tags and values set.

Interactive Details Link – Tags Usage Summary

To get further information from the **"Tags – Usage Summary"** report, users can click on the **"Details"** link and an additional report is presented with all the occurrences of the tag and its value throughout the DocMoto system.

(a) Path – location of the file within the DocMoto system.
(b) Version – current version of the file.
(c) Checked In – date the version of the file was checked in.

(d) By – who carried out the last amendment/edit.
(e) File Size – current file size
(f) Value – the value of the tag set.
(g) Name – the name of the tag.

Checked Out Details

Located under the **"Reports/Folder:<name_of_folder>/Checked Out Details"** menu.

(a) Folder – location of the checked-out document.
(b) Name – the name of the document checked-out.
(c) Checked Out By – who has the document checked-out document.
(d) Checked Out On – date/time the document was checked-out.
(e) Parameters – Most DocMoto reports have parameters that can be set by users to filter the report results.
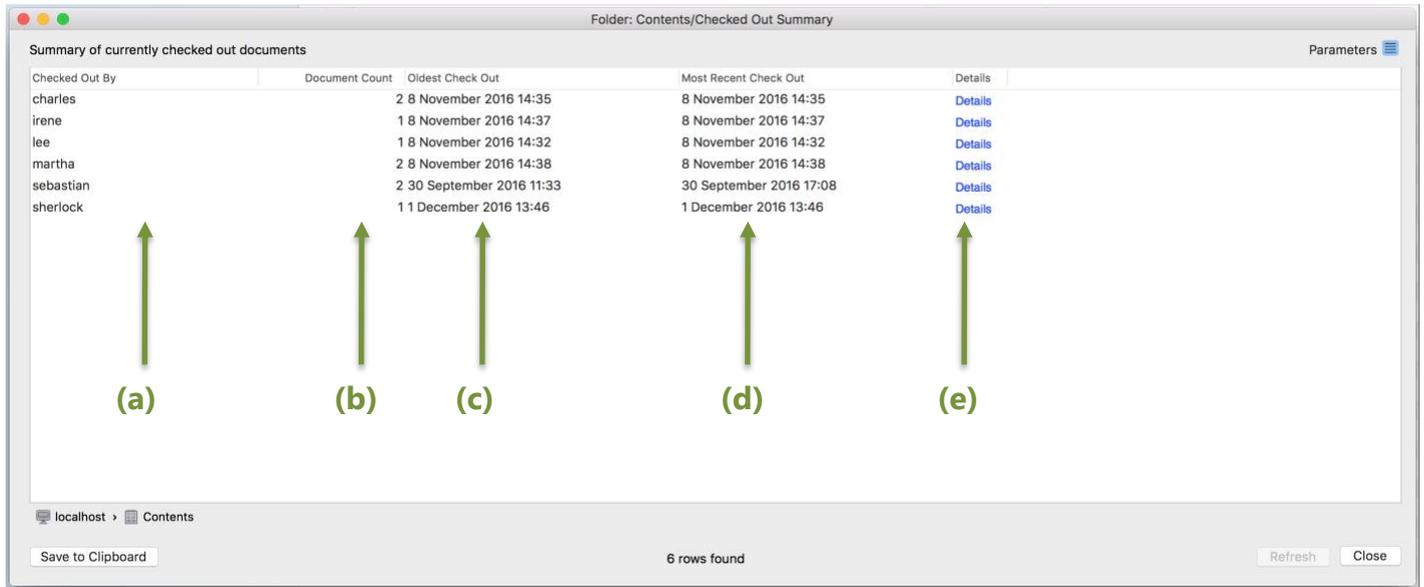

Note: Any report with **"User"** as a parameter will have a default value of **"<Any User>"**. This enables users to fetch a result set for all users i.e. list all documents with a **"Checked Out"** status irrelevant of the user.

Checked Out Summary

Located under the **"Reports/Folder:<name_of_folder>/Checked Out Summary"** menu.
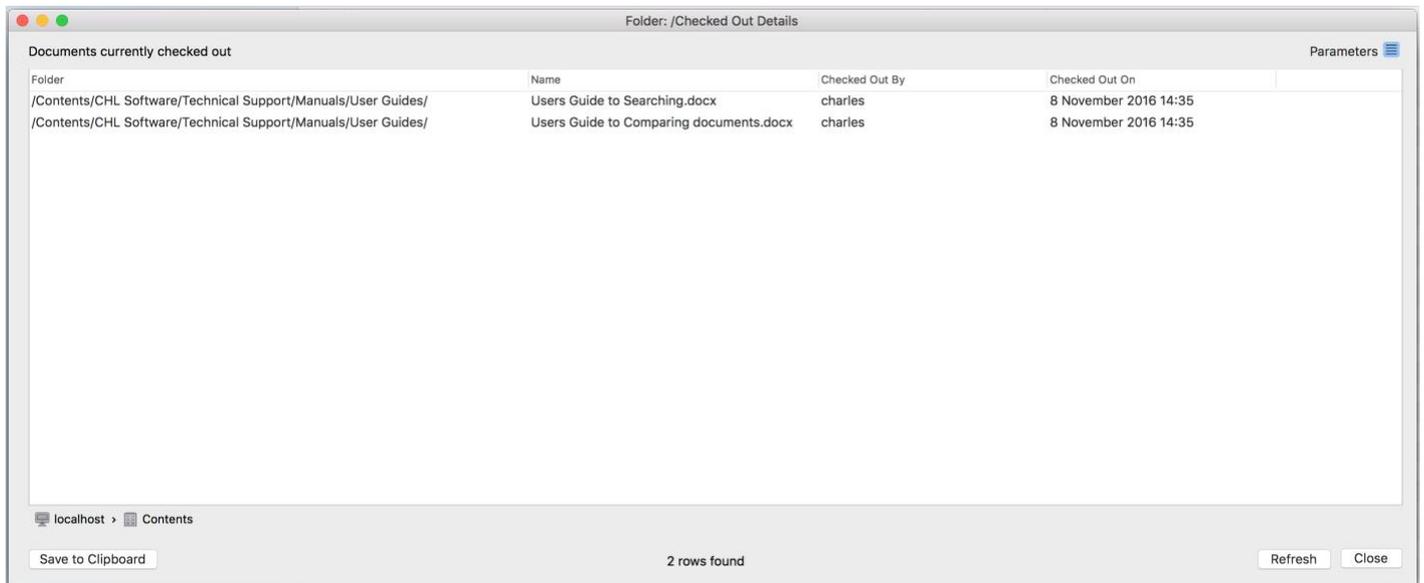

(a) **Checked Out By** – User who has the document checked out.
(b) **Document Count** – The amount of documents the user has checked out.
(c) **Oldest Check Out** – The oldest date of a document checked out by the user.
(d) **Most Recent Check Out** – The most recent date of a document checked out by the user.
(e) **Details** - Interactive link to get more details on the documents checked out to the specific user. The screenshot below illustrates the user selecting the entry for the user **"charles"**.