

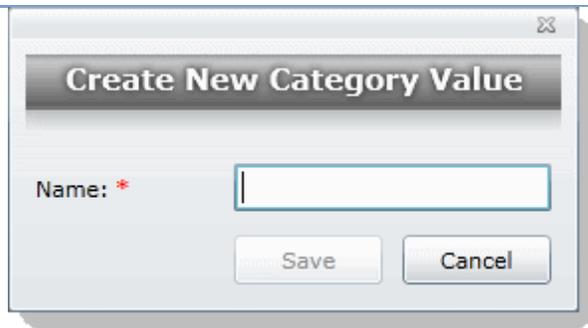
Tag View - Categories

Summation Express/Pro

- Categories in Tag View
- Adding Custom Fields
 1. Case managers with the *Case Administrator* permission can create and edit custom fields. You can use the custom fields to add categories, text, number, and date fields.
 2. Log in as a user with *Case Administrator* rights.
 3. Click on the **Custom Fields** tab.
 4. Click the **Add** button.
 5. In the *Custom Field Detail* form, enter the name of the custom field.
 6. Select a Display Type:
 - A) **Check box**: Create a column that contains a check box. This is for coding categories only.
 - B) **Date**: Create a column that contains a date.
 - C) **Number**: Create a column that contains a number.
 - D) **Radio**: Create a column that contains a radio button. This is for coding categories only.
 - E) **Text**: Create a column that contains text.
 7. Enter a *Description* for the custom field.
 8. Check **ReadOnly** to make the column un-editable.
 9. Click **OK**.
- Editing Custom Fields
 1. Log in as a user with *Case Administrator* rights.
 2. Click on the **Custom Fields** tab.
 3. Select the custom field you want to edit.
 4. Click the **Edit** button.
 5. Make your edits.
 6. Click **OK**.
- Creating Category Values
 1. Log in as a user with *Assign Categories* permissions.
 2. Click the **Case Review** button next to the case in the *Case List*.
 3. In the *Case Explorer*, click the **Tags** tab.
 4. Expand the *Categories*.
 5. Right-click on the category and select **Create Category Value**.

Summation iBlaze

- Categories in Tag View
- Adding a Lookup Table to display in Categories
 1. From the **Case Explorer**, right click **Categories**. A menu is displayed.
 2. Select **Open Tag View**. The **Tagging** window is displayed in the right side of the screen.
 3. Open the **Core Database** in column view.
 4. Locate the fields for which you want to have lookup tables available in the **Categories** section of the **Tagging** window. You can add any field to **Categories** that has a lookup table associated with it.
 5. Right click the title of the field that you want to add to **Categories**. A menu is displayed.
 6. Select **Display [field] in Tag View**. The field's lookup table is added to **Categories** in the **Tagging** window.
- Adding Items to a Categories Lookup Table One at a Time
 1. From the **Case Explorer**, right click **Categories**. A menu is displayed.
 2. Select **Open Tag View**. The **Tagging** window is displayed in the right side of the screen.
 3. In the **Tagging** window, under **Categories**, right-click the **Category** lookup table (for example, **Author** or **Doctype**). A menu is displayed.
 4. Select **Add new [Category] within [Category lookup table]**. The **New Entry for [Category lookup table]** dialog is displayed.
 5. Type a code in the **Shortcut** box.
 6. Type the appropriate value in the **[Category]** box.
 7. Click **Save**.
- Adding Category Tags to Records
 1. From the **Case Explorer**, right click **Categories**.
 2. Select **Open Tag View**.
 3. Gather the group of records you want to



6. Enter a **Name** for the value.

7. Click **Save**.

tag with **Categories**.

4. Open the **Core Database** in column or form view and select the first record. In the **Tagging** window, select the **Category** tag you want to add to the record using the box to the left of the tag.

- Adding Category Tags to Multiple Records

1. From the **Case Explorer**, right click **Categories**. A menu is displayed.

2. Select **Open Tag View**.

3. Make sure the focus is on the column view of the **Core Database**.

4. Gather the group of records you want to tag.

5. Right-click the name of the tag that you want to add to the group of records and select **Assign [category tag] to**.

6. From the sub-menu, select one of the following options:

A) **Current Record** - The selected record is tagged.

B) **Marked Records** - The marked records are tagged.

C) **Unmarked Records** - The unmarked records are tagged.

D) **Current Result Set** - All of the records currently displayed in the column view are tagged.

7. The records are tagged.