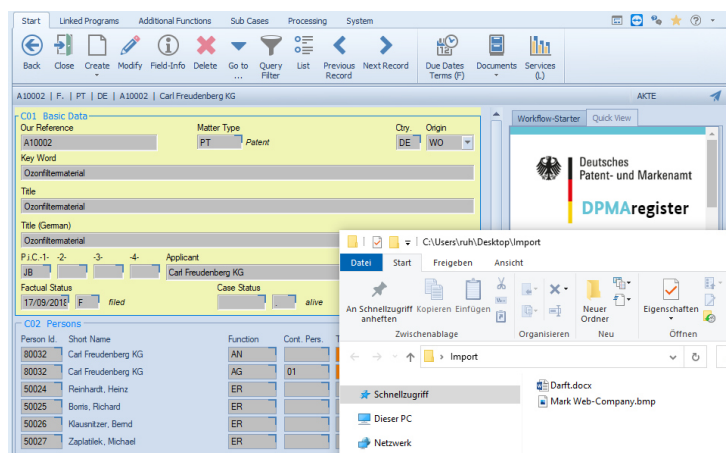



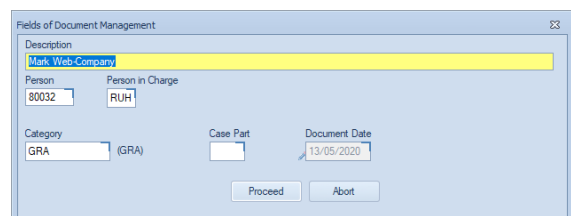
Quick start guide

Import of documents

1. This guide assumes that a case or person record to which a document should be imported is opened and a document in any format (e.g., Microsoft Word, PDF documents) is available (e.g. Explorer is opened, file is on the desktop).
2. The import of documents is done by means of the so-called drag-and-drop technique. The file is clicked with the left mouse button, hold and dragged on the on the PatOrg case.



3. In the next step a import window is opened which is used to enter data related to this document:
The default description will be the file name of the imported document. This should be replaced by a meaningful description of the content of the document. The category is used to identify the document as application text or correspondence. This field is often used as search criteria for document searches. The date information is usually automatically set to the current date. This date will be used to order documents when opened from cases or persons. The document date can be modified by clicking the adjacent  button. The date of creation can be moved to an earlier date. If necessary a person can be linked to the imported document. This would be in addition to the case association. Via the info corner all persons stored in the file will be displayed. To select a person click on it and confirm with "OK" button.
4. Close the document import window by clicking the "Proceed" button.
5. A message boxes will pop-up to confirm successful import of the document. To close the message box click the "OK" button.



Open documents starting from a case or person record

Starting from a case or person record open the associated documents via the "Documents" button or the document menu and selection of one of the sub menus (sub menus are based on search filters), such as the „General documents“ menu.

1. The documents for a case or person are displayed in a list. By double-clicking or by selecting a line and pressing the Enter function (button or key) a so-called document management record opens with detailed information about the document.
2. The corresponding document is opened via the "Open Document" button.

For further questions, please contact our support team by phone +49 (0) 4962 9119-0.