



# CMA

(Case Management Assistant)

# Administrator's Guide

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## **What is CMA:**

CMA is a software tool that assists people in moving documents between folders without the need of windows explorer. Since the user sees only a short name description for what can be a very long path, and the user only sees the folders that pertain to them, this makes it easy to find from a short list where a document needs to be moved to, while alleviating the potential of moving documents to the wrong location.

The program also allows specific folders to be monitored in order to alert the user if someone else has moved a document into their folder. This monitoring makes everyone more productive since the sending party does not have to send an email or make a phone call to let the other person know that a file is ready, or it saves the receiving user the need to constantly monitor these directories themselves.

## **How does it work**

The administrator creates a list of directories (folders) that has a short descriptive name that everyone sees, as well as the full actual path (example: "Beaumont Clerks Office" for the descriptive name and "\\Txed-tyler1\IMAGE\cmusers\div\bmt\clerks" for the actual path).

The administrator also creates a list of users and then assigns directories (folders) to users. You may have a thousand directories, but any particular user may only need to see 10 of these. CMA shows that user only the 10 they need to see

When the user logs into CMA, they receive a configuration file with the list of directories that they can send, receive and monitor.

CMA uses the local machine for all activities. The user can select a directory, then double click a file and edit that file. They can then move that file to another folder. Example: A judge's secretary can be notified that an assistant has just completed a draft petition that has been saved as a PDF document. She can open, edit and save this and then move the file to the Judge for approval. The Judge can then move the file to the docket clerk folder for filing.

Each move is logged to a local log file as well as the log file on the CMAweb server.

There are many options and customization for each action.

## **What do you need:**

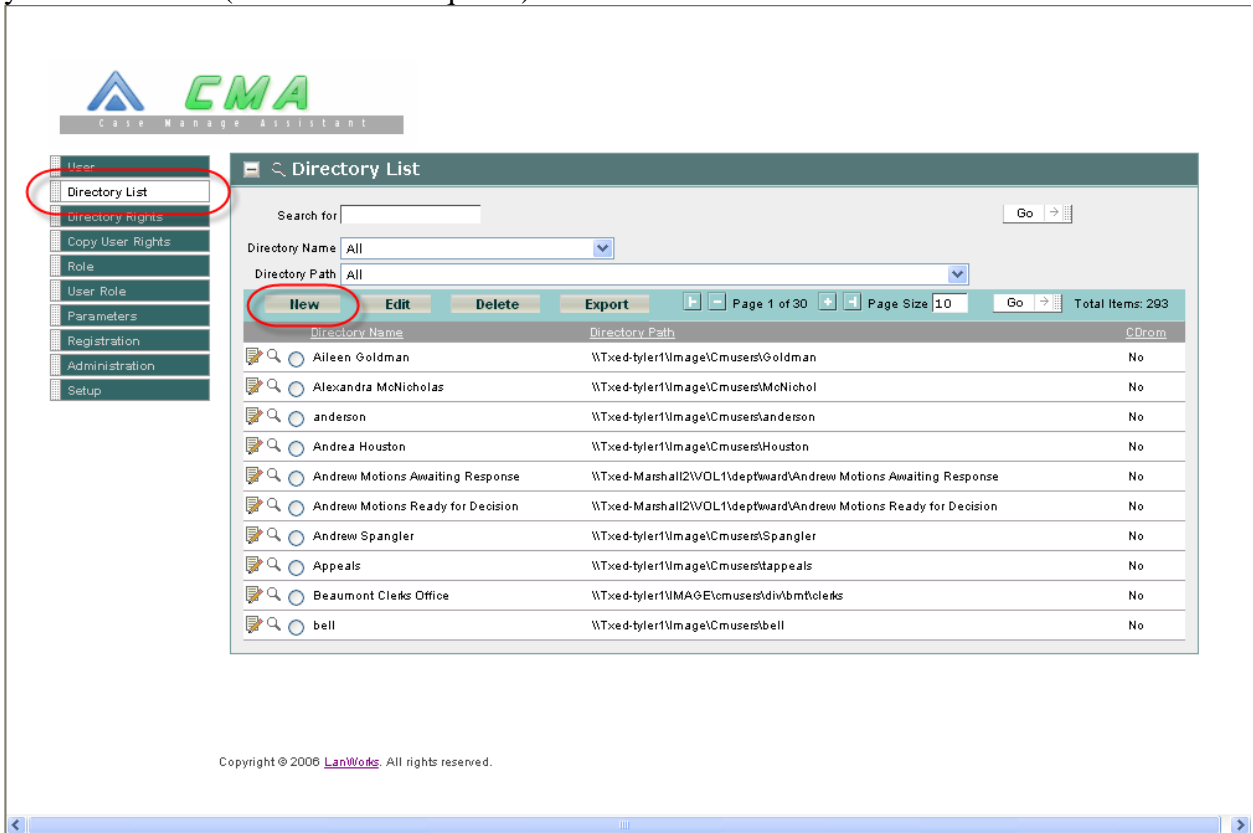
You will need a windows server (2000 or 2003) with I.I.S. (Internet Information Services) installed. You also must have a Windows SQL database server. This can be on the same machine or another server. Since this is a low demand capacity, any existing SQL server should be adequate. You can use either SQL 2000 or 2005 or SQL Express 2005.

The workstations need to be Windows based machines with .Net 1.1 installed (standard XP desktops already have this)

# Administration

## Add new directory

You should add directories first since it is easier to associate them with the users at the time you add the user (but this is not required)



This brings up the screen to add a new directory (you should use UNC paths whenever possible).

The 'Add Directory List' dialog box has a title bar with a minus sign, a plus sign, and a pencil icon. It contains two text input fields: 'Directory Name' and 'Directory Path'. Below these fields is a checkbox labeled 'CD rom?'. The 'Directory Path' field has a vertical scrollbar on its right side.

Save →

Cancel →

## Add new User:

**CMA**  
Case Manage Assistant

User

Directory List  
Directory Rights  
Copy User Rights  
Role  
User Role  
Parameters  
Registration  
Administration  
Setup

Search for:  Go

User Name: All  
Default Directory: All

**New** Edit Delete Export Page 1 of 3 Page Size 10 Go Total Items: 28

User Name	Transaction Log	Default Directory	Check Every x Minutes	Display Only PDF files
Admin			5	Yes
bmtoleks			2	Yes
bmstaffattorneys			2	Yes
brown			2	Yes
bush			2	Yes
elak			2	Yes
cobb			2	Yes
craven			2	Yes
crone			2	Yes
davis			2	Yes

This brings up a new screen to add the user details:

**Add User**

Display Name:

User Name:

Password:

Transaction Log:

Default Directory: **\*\* Please Select \*\*** More

Hours Col 1 (0 for no display):

Hours Col 2:

Display Total File Count:

Flash In Form:

Flash In Tray:

Maximum Log Size (bytes):

Check Every x Minutes:

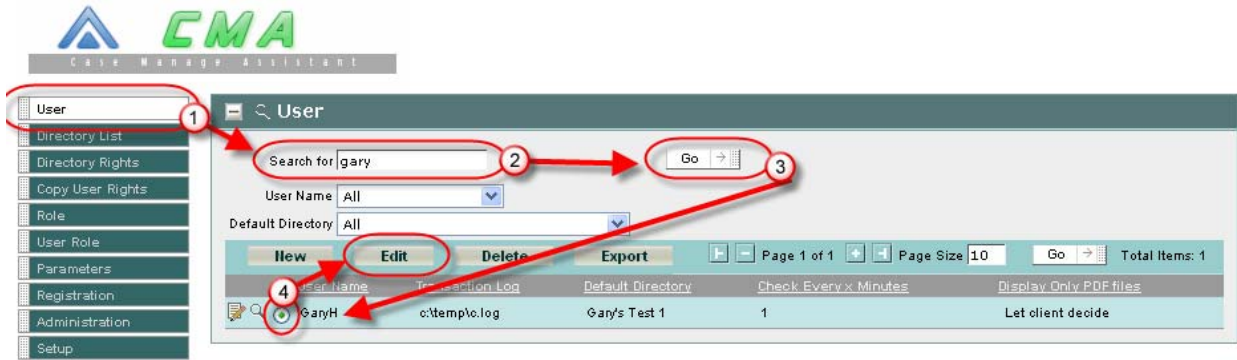
Display Only PDF files: Yes

Open PDF In New Window: **\*\* Please Select \*\***

Change Client To 72Pix If Adobe 7: **\*\* Please Select \*\***

**Save** Cancel

## Edit User and Associate directories



This brings up the screen to edit user info and associate directories for that user.

The 'Edit User' form contains the following fields and options:

- Display Name: Gary Hoehn
- User Name: GaryH
- Password: [Empty]
- Transaction Log: c:\temp\c.log
- Default Directory: Gary's Test 1
- Hours Col 1 (0 for no display): 0
- Hours Col 2: 0
- Display Total File Count:
- Flash In Form:
- Flash In Tray:
- Maximum Log Size (bytes): 1000000
- Check Every x Minutes: 1
- Display Only PDF files: Let client decide
- Open PDF In New Window: Let client decide
- Change Client To 72Pix If Adobe 7: Let client decide

**Add new directories here**

The 'Directory Rights' screen shows a list of directories with their permissions:

Directory	Create	Read	Update	Delete	Notify
Gary's Test 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gary's test 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gary's Test 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gary Test 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gary's S drive (CDrom)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gary's R; drive (cdrom)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save    Cancel

## Copy users rights to another user

**Copy users rights from one user to another**  
This is a very dangerous utility. Please use with care as there is no undo feature!

- User
- Directory List
- Directory Rights
- Copy User Rights**
- Role
- User Role
- Parameters
- Registration
- Administration
- Setup

Copy From:

Copy To:

[Append The rights](#)

[Replace the rights \(Make the same\)](#)

**Choose** 

## Add another administrator

You have to specify a user as an administrator to get to this configuration set of menus.



The screenshot displays the CMA Case Manager Assistant interface. On the left is a vertical navigation menu with the following items: User, Directory List, Directory Rights, Copy User Rights, Role, **User Role** (highlighted with a red circle), Parameters, Registration, Administration, and Setup. The main content area is titled "User Role" and contains the following elements:

- Role: All (dropdown menu)
- User: All (dropdown menu)
- Buttons: New, Edit, Delete, Export
- Page navigation: Page 1 of 1, Page Size 10, Go, Total Items: 3
- Table with columns Role and User:

Role	User
Admin	Admin
Admin	GaryH
Admin	Morris

## Setting Parameters

You can add special hyper-links to the user main menu from here

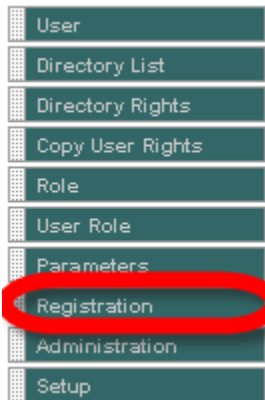


The screenshot displays the CMA Case Management Assistant interface. On the left is a vertical navigation menu with the following items: User, Directory List, Directory Rights, Copy User Rights, Role, User Role, **Parameters** (highlighted with a red circle), Registration, Administration, and Setup. The main content area is titled "Parameters (leave the LinkName blank to NOT show the button)". It features a toolbar with "Edit" and "Export" buttons, pagination controls showing "Page 1 of 1", a "Page Size" dropdown set to "10", a "Go" button, and "Total Items: 4". Below the toolbar is a table with two columns: "Parameter Item" and "Parameter Value".

Parameter Item	Parameter Value
LinkAddress1	http://www.google.com
LinkAddress2	c:\windows\system32\notepad.exe
LinkName1	Google
LinkName2	

## Registration

If the registration expires, the program still works but you get a warning message that is it expired.



### Registration Information

Main Menu

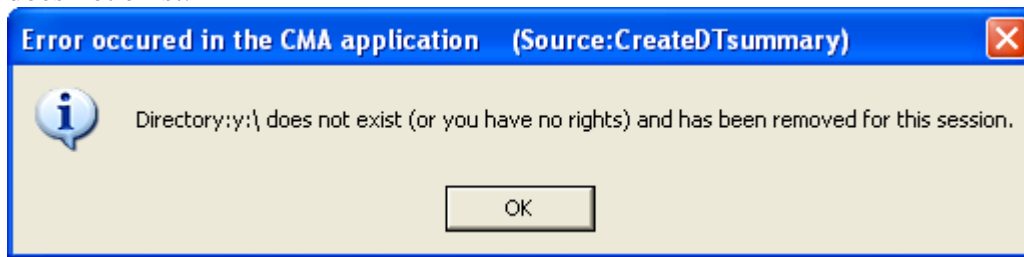
Actual Server Name	<input type="text" value="Your server"/>
Registered Server Name	<input type="text" value="Your server"/>
Expiration Date	<input type="text"/>

We send you a new key code and you paste it here and then click update.

New registration code

## What if:

\* If you establish a folder that does not exist OR if the user does not have rights to that folder, then you will get an error message that says the directory does not exist and has been removed for this session. That keeps the program from trying to check on the contents of a folder that does not exist.



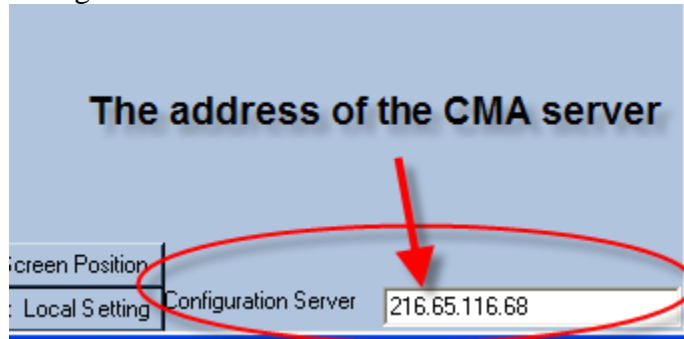
If you have an excessive amount of files in multiple directories, or if the directories are on the other side of a slow network connection, then updates will be slow and will cause the program to appear sluggish. You can boost performance by reducing the directories to monitor, reducing the files in each folder that is monitored or reducing the minutes between updates. Example. Monitor 10 folders with less than 100 files in each and update only every 5 minutes.

## User Installation:

The application must be installed the first time. One approach would be to send an email with the link to the installation.

example <http://<your cma server>/CMAweb/Setup/CMA.Setup.msi>

In the email you would also explain that they must enter the CMAweb server name as the configuration server



**Make sure to also send the user their CMA login ID and CMA password.**

Subsequent updates to the program automatically prompt the user that a new version is available and they make 3 confirmation clicks to install those updates.