ELECTROFILE

VERSION 1.0
DEMO MANUAL

ElectroFile software written by Chris Lydgate and Ted Slupesky
ElectroFile manual written by Chris Lydgate, Ted Slupesky
and Katharine Beers

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ELECTROFILE

DISCLAIMER OF WARRANTY

This software and manual are given freely "as is" and without warranties as to performance or merchantability. The salespersons may have made statements about this software. Any such statements do not constitute warranties and shall not be relied on by the buyer in deciding whether to purchase this program. This demo program is given away without any express or implied warranties whatsoever. Because of the diversity of conditions and hardware under which this program may be used, no warranty of fitness for a particular purpose is offered. The user is advised to test the program thoroughly before relying on it. The user must assume the entire risk of using the program.

Welcome to ElectroFile.

We're glad that you're interested in ElectroFile. ElectroFile integrates all of the functions needed for electronic filing into a powerful package that's easy to use. It can handle virtually any type of document you have, whether produced directly on a NeXT computer or in some other way.

Electronic filing offers significant advantages over paper- or microfilm-based filing. Since electronic filing uses a computer-based system of multiple cross-classification, document retrieval is substantially faster and more productive than traditional archival mechanisms. Powerful search capabilities coupled with an intuitive graphical interface help users find what they're looking for, no matter what size the database. In addition, ElectroFile offers complete integration with standard NeXT facilities such as electronic mail and fax transmission, enhancing workgroup interaction. In short, electronic filing won't give you a paperless office, but it will put you back in control of the paper you already have.

Much of what makes ElectroFile such a sophisticated electronic filing system is its ease of use. You should have an excellent understanding of our program after reading the next few pages and experimenting with the application a few times.

About This Manual

This manual provides an introduction to ElectroFile, first by discussing a few examples of how ElectroFile is currently being used, and then by walking you through a brief tutorial. This manual is intended only to give you an introduction to ElectroFile; we leave you plenty of room to discover various features of our application on your own.

About This Program

You should be aware that since this is a demonstration copy of ElectroFile, *you will not be able to create new libraries, nor will you be able to process more than fifty documents in the example library.* Except for these restrictions, this copy of ElectroFile is fully functional.

If you have any questions, or wish to purchase ElectroFile, please feel free to call us anytime at (800) 453-2344 (or +1 503.222.2425 if you are calling internationally). You may send e-mail to info@insight.com.

ElectroFile is also available through NeXTConnection.

ElectroFile In Action

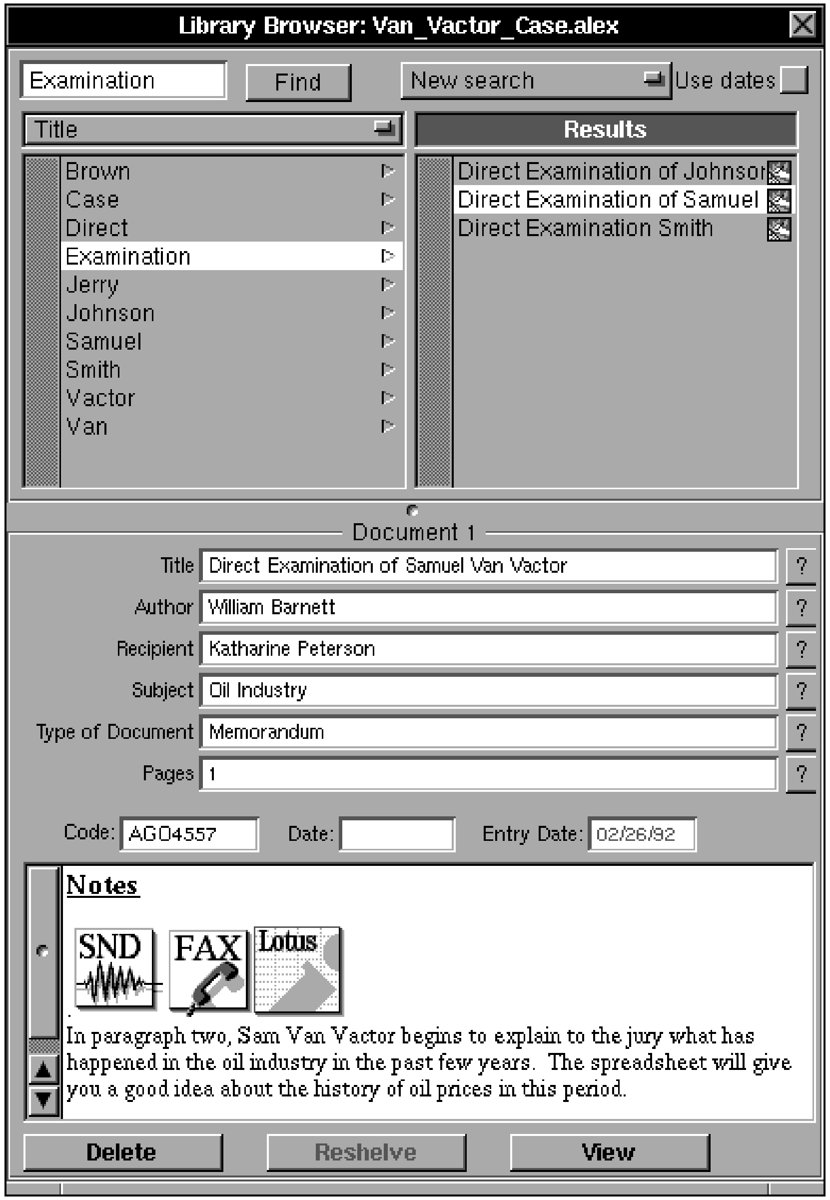
Anyone with a NeXT computer can benefit from ElectroFile. Although ElectroFile can be used in complex, data-intensive environments (as our examples below demonstrate), it's also extremely useful for simpler tasks, such as:

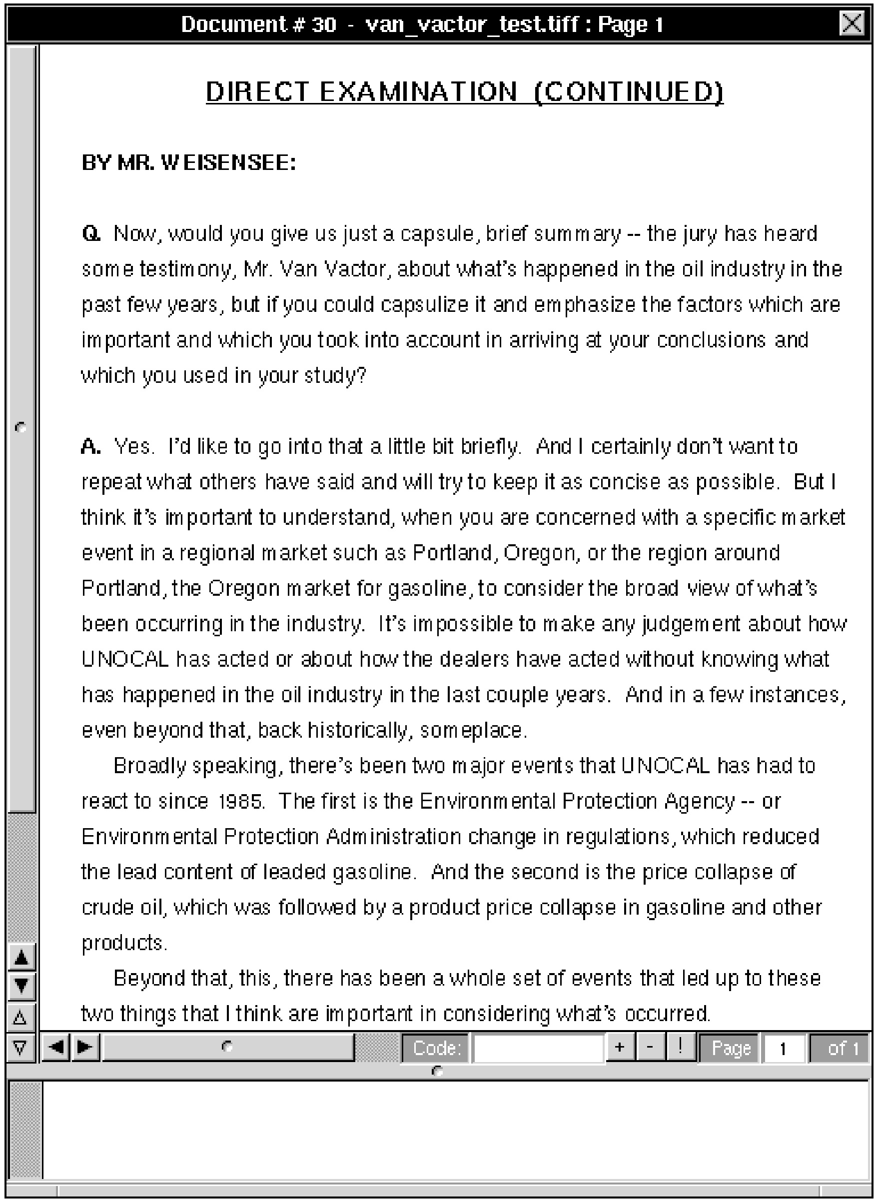
- organizing your personal files
- processing faxes
- filing routine office memoranda
- processing orders

Alternatively, ElectroFile can handle more demanding tasks, such as retrieving customer service data and correspondence in real time, while the customer is on the phone. Whether for commercial or personal use, ElectroFile can increase your productivity.

ElectroFile in Litigation

ElectroFile was originally designed to resolve one of the most difficult problems in civil litigation: how to manage enormous case files in order to maximize courtroom effectiveness. ElectroFile is the only imaging system designed to assist attorneys through the entire cycle of litigation. The same system that organizes documents in discovery can be taken to the courtroom and used on-site, providing unparalleled flexibility to the litigation team. In addition, ElectroFile fully utilizes the NeXT Computer's superior display characteristics, making it an outstanding choice for real-time display of documents to judge, jury, and opposing counsel.





DIRECT EXAMINATION (CONTINUED)

BY MR. WEISENSEE:

Q. Now, would you give us just a capsule, brief summary -- the jury has heard some testimony, Mr. Van Vactor, about what's happened in the oil industry in the past few years, but if you could capsulize it and emphasize the factors which are important and which you took into account in arriving at your conclusions and which you used in your study?

A. Yes. I'd like to go into that a little bit briefly. And I certainly don't want to repeat what others have said and will try to keep it as concise as possible. But I think it's important to understand, when you are concerned with a specific market event in a regional market such as Portland, Oregon, or the region around Portland, the Oregon market for gasoline, to consider the broad view of what's been occurring in the industry. It's impossible to make any judgement about how UNOCAL has acted or about how the dealers have acted without knowing what has happened in the oil industry in the last couple years. And in a few instances, even beyond that, back historically, someplace.

Broadly speaking, there's been two major events that UNOCAL has had to react to since 1985. The first is the Environmental Protection Agency -- or Environmental Protection Administration change in regulations, which reduced the lead content of leaded gasoline. And the second is the price collapse of crude oil, which was followed by a product price collapse in gasoline and other products.

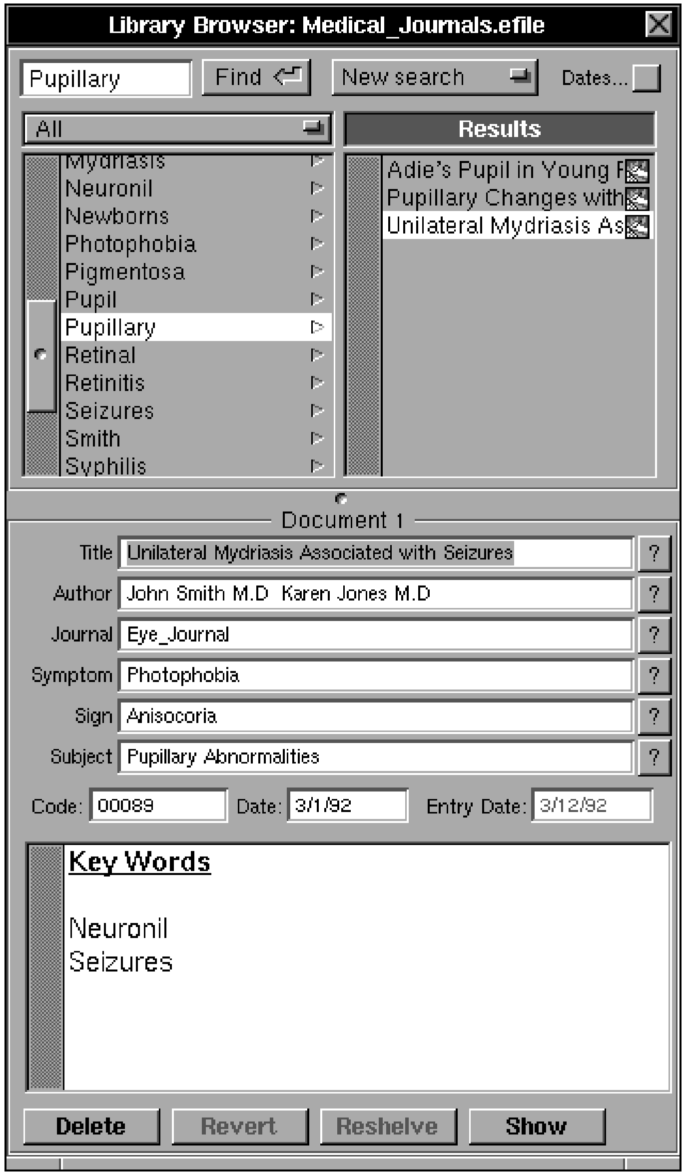
Beyond that, this, there has been a whole set of events that led up to these two things that I think are important in considering what's occurred.

ElectroFile in Medicine

ElectroFile is perfectly suited for the medical industry, in which numerous patient records must be securely stored for long periods of time. An office manager may use Electrofile to keep track of patient scheduling and billing, while physicians may use ElectroFile to store notes concerning patient health.

Additionally, ElectroFile is the ideal solution to keeping current with recent literature; physicians can scan journal articles and then retrieve them by title, subject, keyword, author, or any other classification scheme. The imaging power of NeXT also allows physicians to store photographic and radio-graphic material.

Our example illustrates how an ophthalmologist who is seeing a patient with a pupil abnormality might quickly retrieve all pertinent articles by typing any one of several keywords.


Library Browser: Medical_Journals.efile
Pupillary
Find
New search
Dates...
All
Results
Mydriasis
Neuronil
Newborns
Photophobia
Pigmentosa
Pupil
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Retinal
Retinitis
Seizures
Smith
Syphilis
Adie's Pupil in Young F
Pupillary Changes with
Unilateral Mydriasis As
Document 1
Title
Unilateral Mydriasis Associated with Seizures
Author
John Smith M.D Karen Jones M.D
Journal
Eye_Journal
Symptom
Photophobia
Sign
Anisocoria
Subject
Pupillary Abnormalities
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Date: 3/1/92
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Key Words
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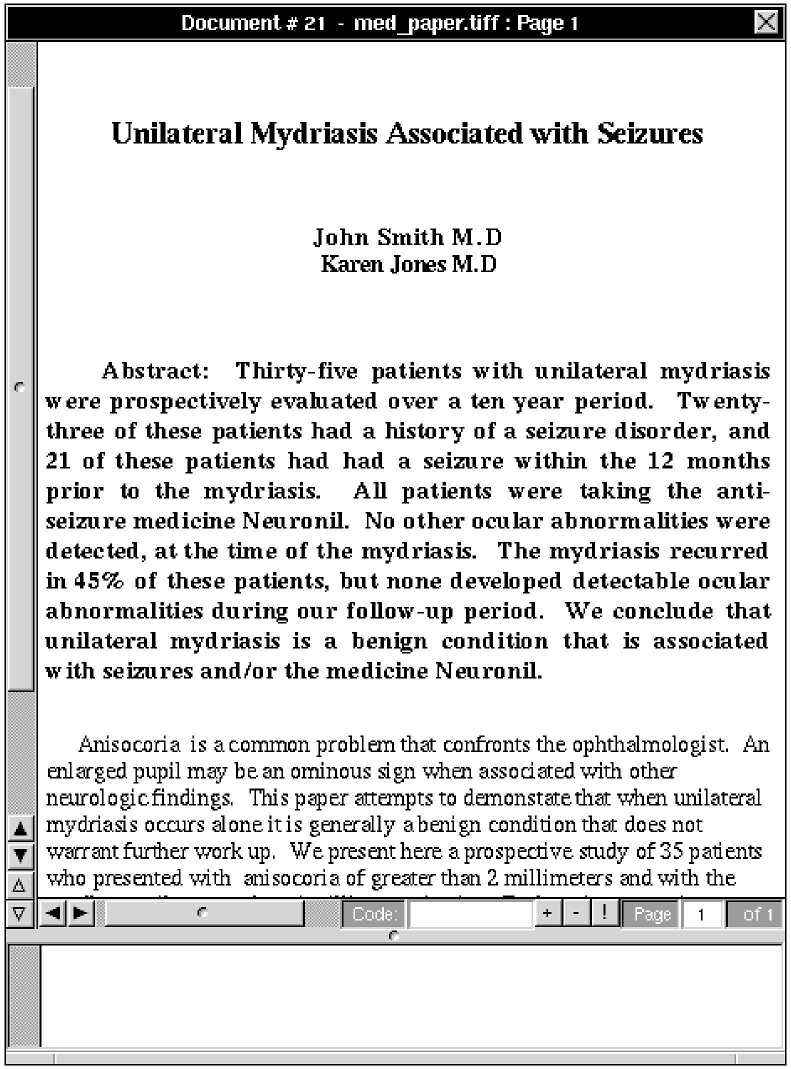
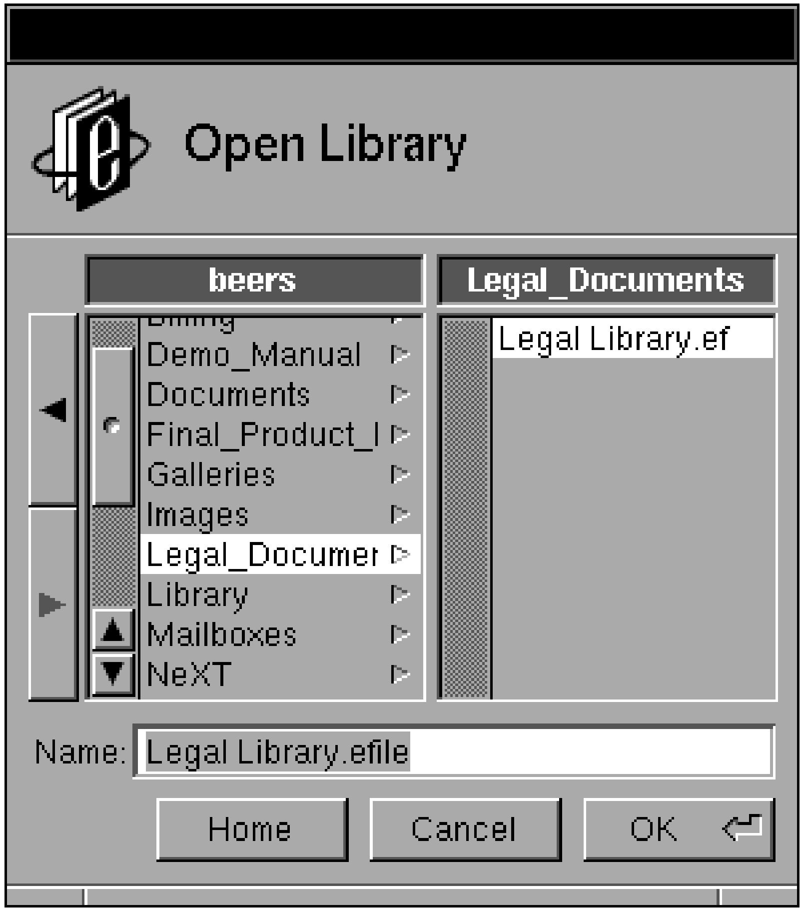

Document # 21 - med_paper.tiff : Page 1
Unilateral Mydriasis Associated with Seizures
John Smith M.D
Karen Jones M.D
Abstract: Thirty-five patients with unilateral mydriasis were prospectively evaluated over a ten year period. Twenty-three of these patients had a history of a seizure disorder, and 21 of these patients had had a seizure within the 12 months prior to the mydriasis. All patients were taking the anti-seizure medicine Neuronil. No other ocular abnormalities were detected, at the time of the mydriasis. The mydriasis recurred in 45% of these patients, but none developed detectable ocular abnormalities during our follow-up period. We conclude that unilateral mydriasis is a benign condition that is associated with seizures and/or the medicine Neuronil.
Anisocoria is a common problem that confronts the ophthalmologist. An enlarged pupil may be an ominous sign when associated with other neurologic findings. This paper attempts to demonstate that when unilateral mydriasis occurs alone it is generally a benign condition that does not warrant further work up. We present here a prospective study of 35 patients who presented with anisocoria of greater than 2 millimeters and with the
Code:
Page
1
of 1

Demo Tutorial: The Law Library

<u>Getting Started</u>

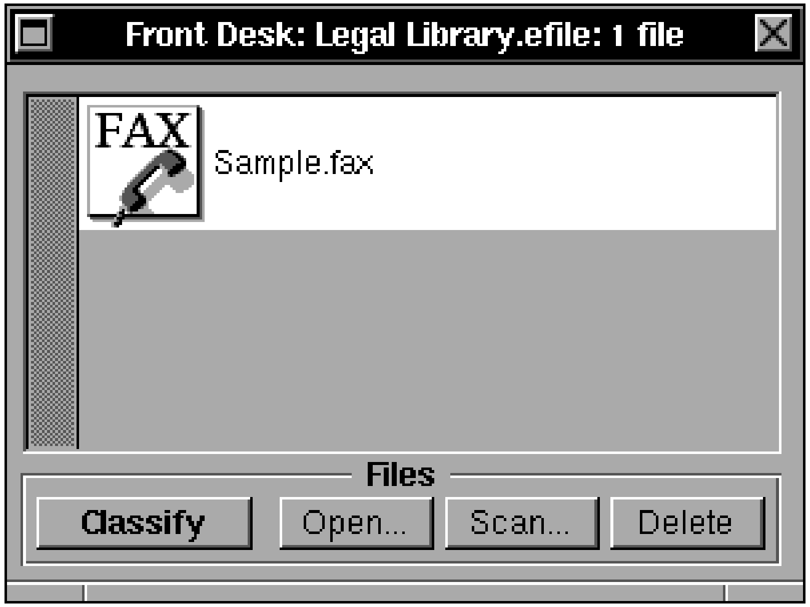
Installing ElectroFile is very easy. Insert the disk labeled *ElectroFile Version 1.0 Demo* and drag the `ElectroFile.app` icon into an Apps directory (such as `/LocalApps` or your own `Apps` directory—you may need to be logged in as `root` to install things in `/LocalApps`). Next, insert the disk labeled *The Law Library* and drag the `LegalLibrary.efile` icon into a directory such as your home directory. We suggest that you then log out and log back in.

Next, launch ElectroFile by double-clicking on its icon. Select Open Library from the library submenu. The following panel will appear:



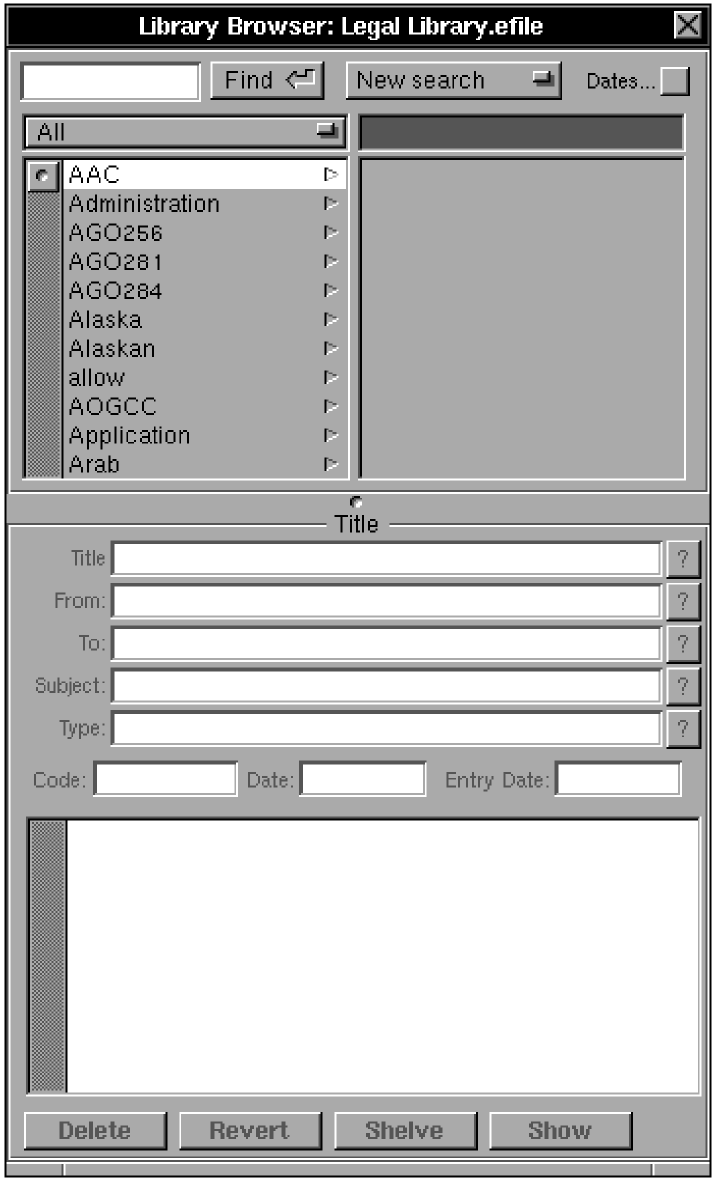
Find and open the *Legal Library*. Both the *Front Desk* and the *Library Browser* will appear.

The Front Desk



The *Front Desk* is the “gate” into ElectroFile. To create a document, you first have to load a file into the Front Desk. There are several ways to do this. You can drag one or many files from the Workspace Manager into the Front Desk, and let go; the icons will appear inside. Or, you can click the *Open button* to get the *Open Panel.* You can also use ElectroFile’s own scanner module to scan a new image into the Front Desk, if you have an HSD scanner.

The Library Browser

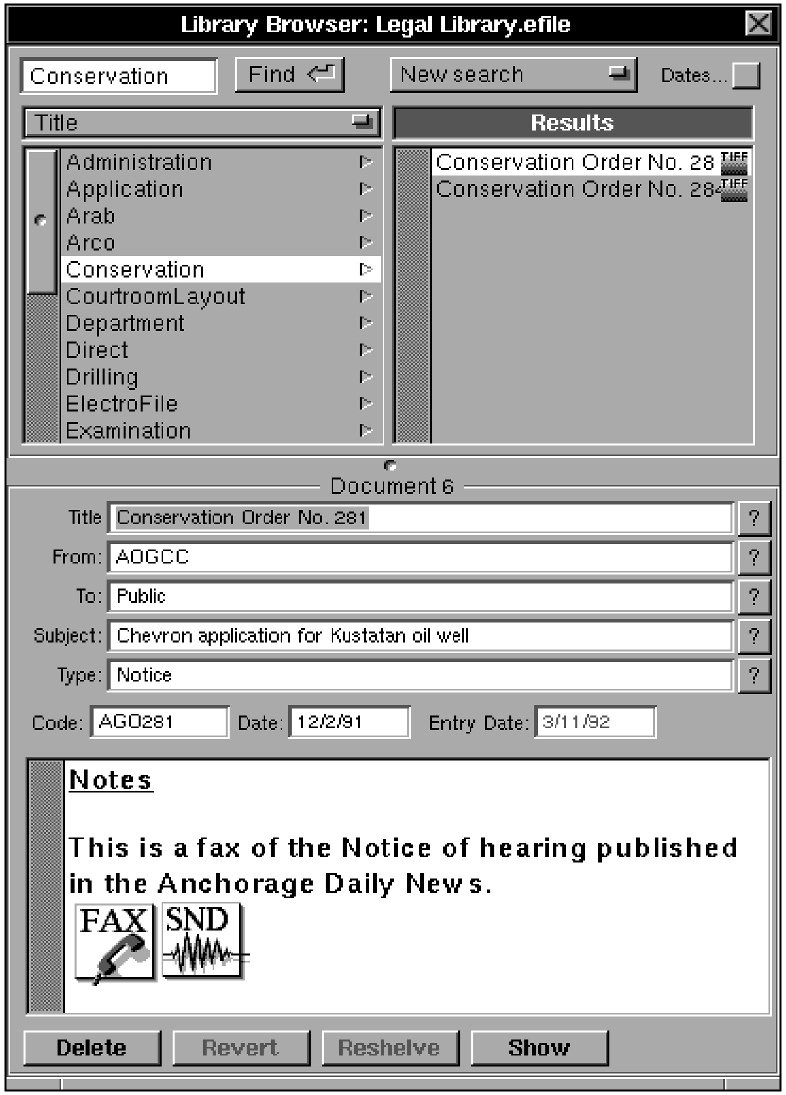


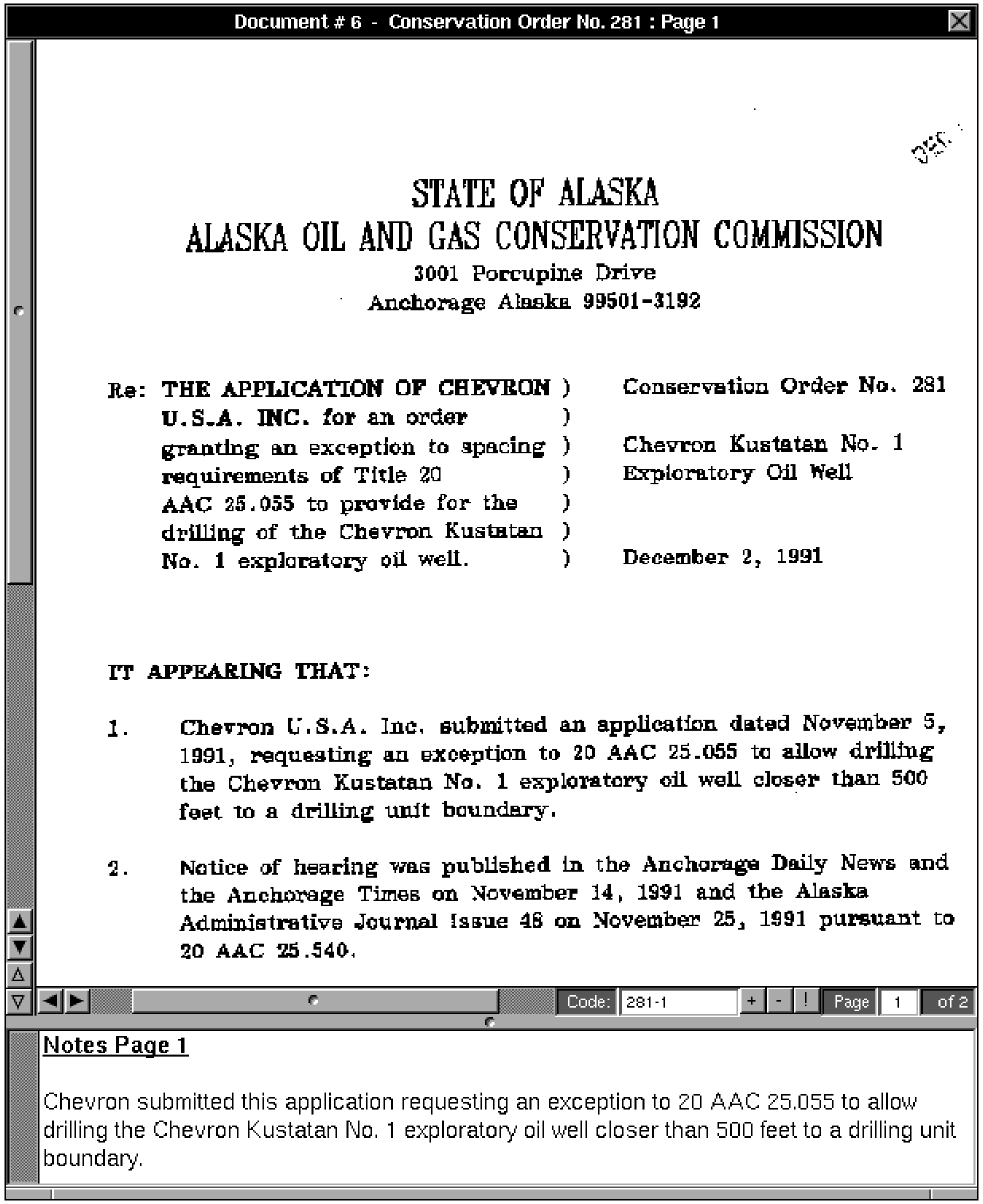
The *Library Browser* shows you all the information about a document: it displays the classification fields specified when the library was created, and allows you to enter or change that information. As mentioned, you can type in whatever you want for these fields, or leave them blank, if they are not appropriate.

<u>Retrieving Documents</u>

Searching "All"

Suppose you want to retrieve a document that had something to do with *conservation*—that's all you remember about it. Type the word "conservation" in the textfield atop the browser. Now click *Find.* Notice that the word conservation appears highlighted in the first column and that all documents which have to do with conservation appear in the *Results* column. Click on "Conservation Order Number 281." All of the information used to classify this document appears immediately. The word "conservation" is highlighted. If you wish to see the original document, hit *Show*.




Document # 6 - Conservation Order No. 281 : Page 1

STATE OF ALASKA

ALASKA OIL AND GAS CONSERVATION COMMISSION

3001 Porcupine Drive

Anchorage Alaska 99501-3192

Re: THE APPLICATION OF CHEVRON U.S.A. INC. for an order granting an exception to spacing requirements of Title 20 AAC 25.055 to provide for the drilling of the Chevron Kustatan No. 1 exploratory oil well.	)	Conservation Order No. 281 Chevron Kustatan No. 1 Exploratory Oil Well December 2, 1991

IT APPEARING THAT:

1. Chevron U.S.A. Inc. submitted an application dated November 5, 1991, requesting an exception to 20 AAC 25.055 to allow drilling the Chevron Kustatan No. 1 exploratory oil well closer than 500 feet to a drilling unit boundary.

2. Notice of hearing was published in the Anchorage Daily News and the Anchorage Times on November 14, 1991 and the Alaska Administrative Journal issue 48 on November 25, 1991 pursuant to 20 AAC 25.540.

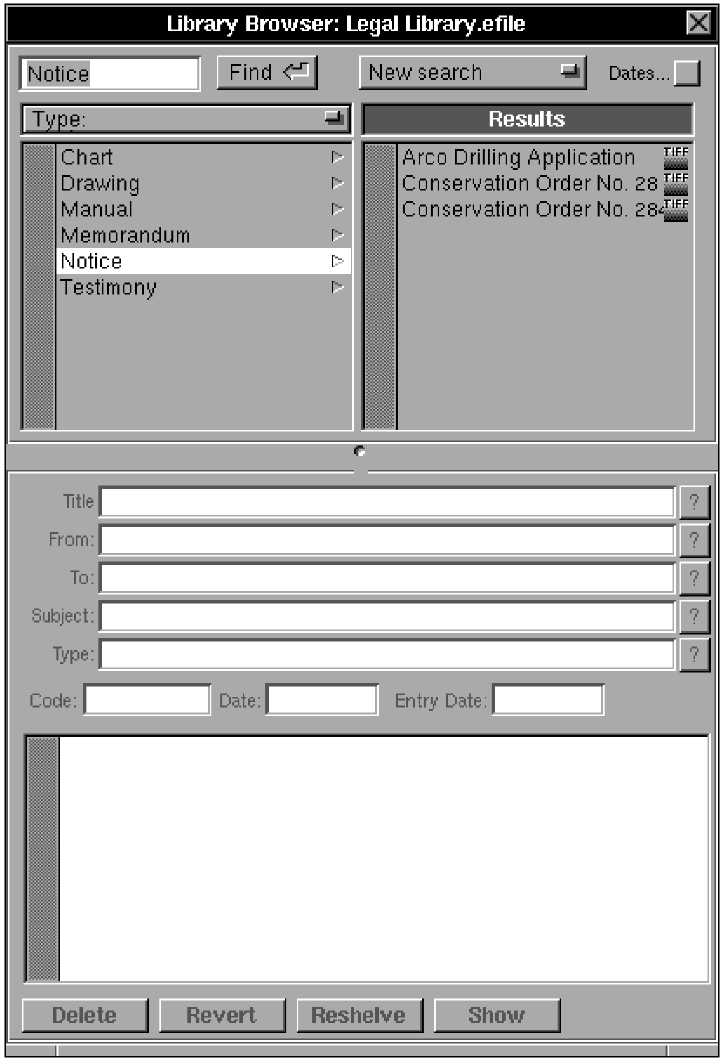
Code: 281-1 Page 1 of 2

Notes Page 1

Chevron submitted this application requesting an exception to 20 AAC 25.055 to allow drilling the Chevron Kustatan No. 1 exploratory oil well closer than 500 feet to a drilling unit boundary.

Searching A Specific Field

A field search allows you to restrict your search to a specific field. For example, to search for legal “notices," select “type” from the pop-up list above the left column of the browser. The browser will display all the keywords in the “type” field. Select “notice.” This will bring up the titles of every notice in the Law Library.

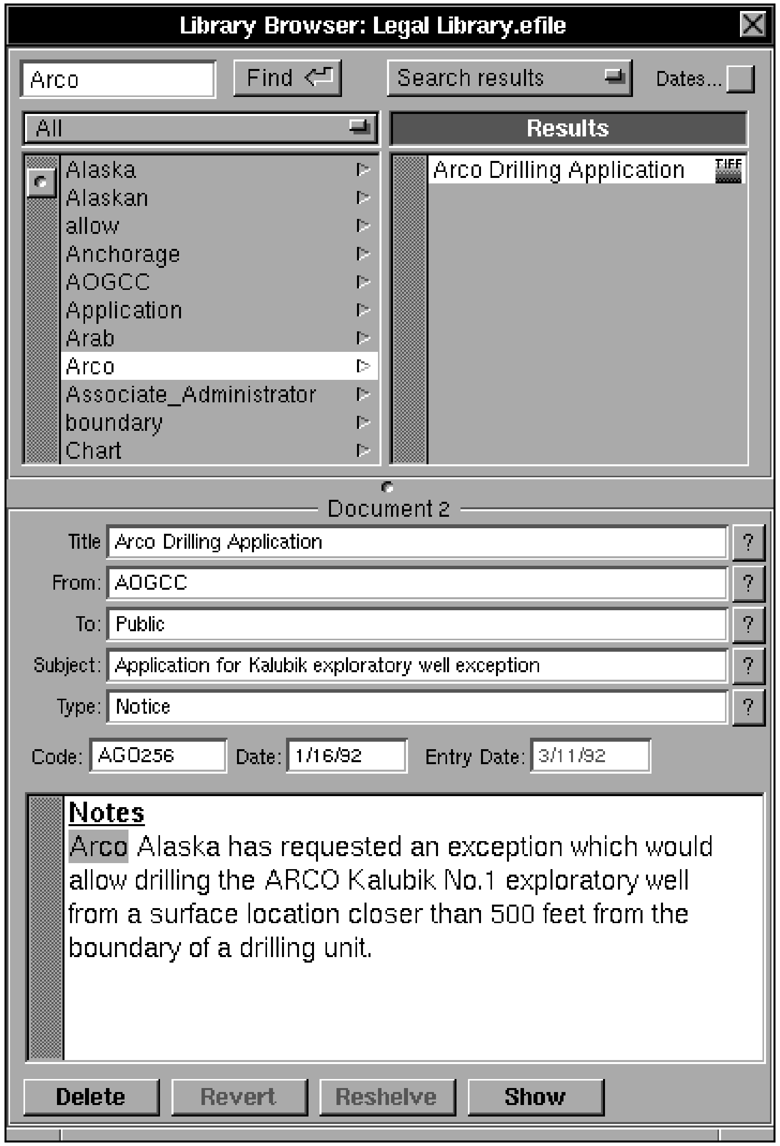


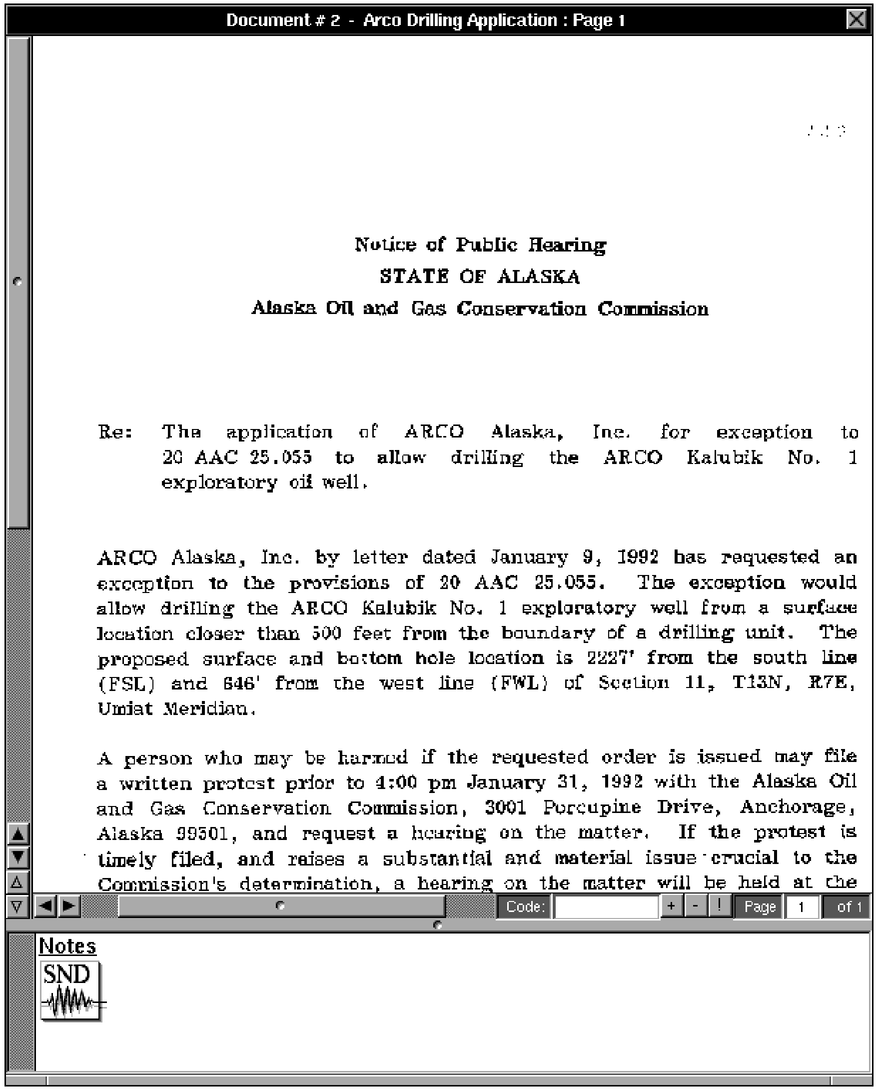
Complex Searches

Complex searches can be built quite easily using either the Search Mode pop-up list or the Date button located above the browser, to the right. These options allow you to restrict or extend a search.

For example, suppose you want to find every document that matches the word *Alaska*. Choose "All" in the field pop-up list, and select *Alaska* in the browser. Four different documents will appear in the results column.

Let's say you now want to restrict your search and retrieve only those documents which have to do with Arco in Alaska. First choose *Search Results* from the Search Mode pop-up list. This restricts your next search to only those documents which are already in the Results column. Select "Arco" in the browser. Now just one document, *The Arco Drilling Application* will appear in the results column.





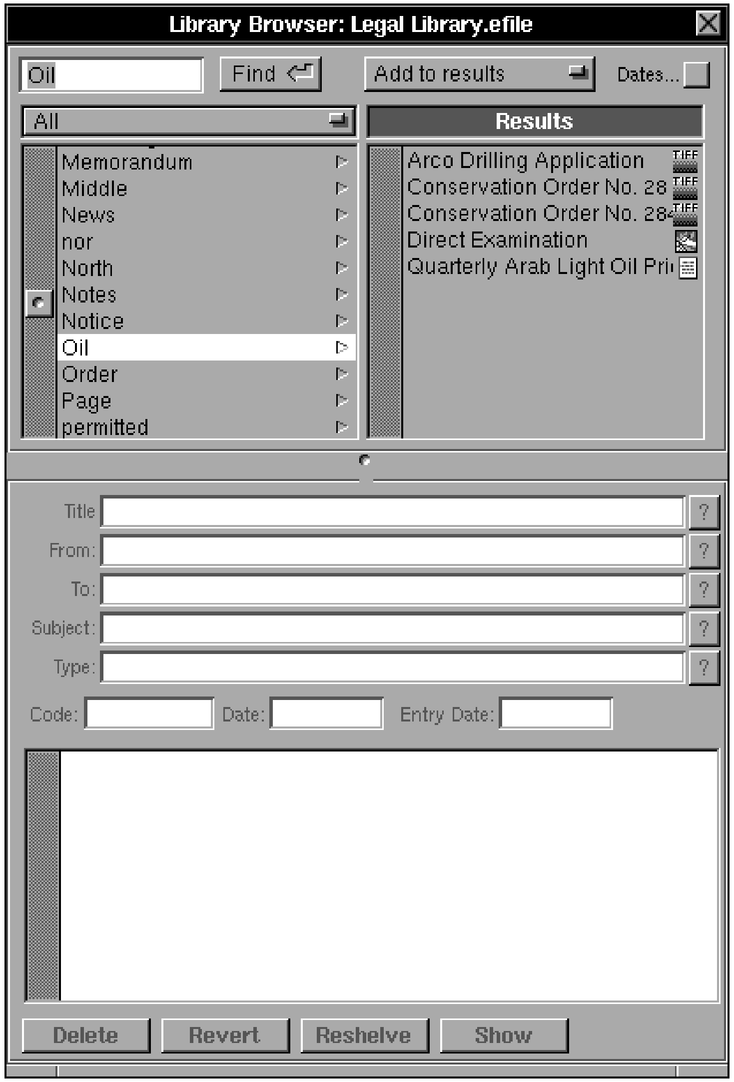
Notice of Public Hearing
STATE OF ALASKA
Alaska Oil and Gas Conservation Commission

Re: The application of ARCO Alaska, Inc. for exception to 20 AAC 25.055 to allow drilling the ARCO Kalubik No. 1 exploratory oil well.

ARCO Alaska, Inc. by letter dated January 9, 1992 has requested an exception to the provisions of 20 AAC 25.055. The exception would allow drilling the ARCO Kalubik No. 1 exploratory well from a surface location closer than 500 feet from the boundary of a drilling unit. The proposed surface and bottom hole location is 2227' from the south line (FSL) and 646' from the west line (FWL) of Section 11, T13N, R7E, Umiat Meridian.

A person who may be harmed if the requested order is issued may file a written protest prior to 4:00 pm January 31, 1992 with the Alaska Oil and Gas Conservation Commission, 3001 Porcupine Drive, Anchorage, Alaska 99501, and request a hearing on the matter. If the protest is timely filed, and raises a substantial and material issue crucial to the Commission's determination, a hearing on the matter will be held at the

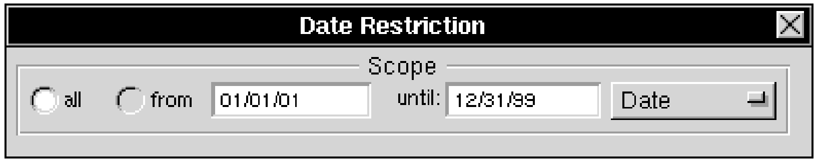
Alternatively, suppose you want to extend a search; you've found the *Arco Drilling Application* and now you want to find all of the documents which have to do with oil. Choose *Add To Results* from the Search Mode pop-up list. This will add the results of your next search to the documents that are already in the Results column. Now choose "all" from the field pop-up list, and select *oil.* This will add four more documents to your existing results.



You can repeat these steps to build arbitrarily complex searches. Don't forget that if you've used these options, and you want to begin a search from scratch, then you'll need to select the *New Search* option.

The Date Button

The Date button allows you to further fine-tune your search. Click the Date button to bring up the following panel:



You can restrict your search by selecting "from" and entering in your own dates. The date button gives you the option of retrieving a document based upon either the date the document was actually classified (entry date) or an arbitrary date which you have manually entered into the classification interface. For example, you can search for documents which were signed last year by using the "date" button. Alternatively, you may select "entry date" and search for documents which were classified in ElectroFile last month.

Reshelving and Deleting Documents

When you look at a document you've retrieved from a library, you get the familiar Library Browser and Viewer, but with a few subtle differences: the *Delete* button is now enabled, allowing you to delete the document. Also, the *Shelve* button now says *Reshelve.* That means you can change the way you've classified a document and reshelve it the new way. The old indexing will be automatically deleted from the library. You can also change or add new attachments this way. Remember, none of your changes get logged into the system unless you hit *Reshelve*. If you make changes to your classification fields that you don't wish to save, hit *Revert.* This will save your original document without your latest changes. Because you could accidentally delete or revert an important document without meaning to, ElectroFile will ask you if that's really what you want to do.

Classifying Documents

To classify a document, drag a file from your viewer and drop it into the Front Desk. Select its icon and click the *Classify* button. You may now type whatever information you wish into the document's fields. Note that *Entry Date* is automatically filled in for you.

The Keys Panel

If you find yourself repeatedly entering the same classification information into different documents, you may appreciate the *Keys Panel.* Click the "*?*" button next to the field "From*.*" A panel will appear showing you all the values that have previously been entered for that field. If you select one of these values, it will appear in your classification field. Select "InsightSoftware." This will now be entered in the "From" field. Each time you assign a new entry into a classification field, it will automatically be added to the Keys Panel.

The Notes Field

The scrolling text at the bottom of the page is the *Notes* field; it's designed to accommodate notes on the document in entirety or comments which may not fit in the other fields. Notes includes a full-fledged text editor which allows you to cut, copy, paste, spell, find, and format your text. You may also attach other files to the *Notes* field such as spreadsheets, word processing files, or even dictation. Attachments will be discussed in greater detail in the final paragraph.

The Document Viewer

If the document you are classifying is a .tiff or .eps file, it will appear in the Document Viewer, adjacent to the *Library Browser* (otherwise, ElectroFile will launch whatever application is appropriate in order to display the document for you). You can zoom in and out by selecting the keys marked "+" and "-". If your document has multiple pages, you can scroll through them by selecting either the up or down arrows. Each page of a multiple-page document can have its own notes and code; the section for notes will appear at the bottom of each page in your document. You are not limited in the number of words you can write on each page. The scroll bar to the left of the notes section allows you to continue writing. As you scroll through a document's pages, the *Notes* section and *Code* field will indicate the proper values for the current page.

Attachments

ElectroFile also makes it very easy to *attach* other files to your document. You can have as many attachments as you want and you can attach anything you want: other images, spreadsheets, soundfiles, whatever. Just drag the appropriate icon over the notes section in either the *Library Browser* or the *Doc Viewer* (depending on whether the attachment pertains to the document in entirety or to an individual page of the document) and drop it in. The icon of your attached file will appear in the notes section of your choice. For example, retrieve "Conservation Order Number 281." Notice that both a fax and a soundfile have been attached in the notes section of the classification interface.