



DEXS Shareware Help File

Documents and Exhibits System (DEXS) Version 2.1c

Click below on the topic of your choice. Additional options will appear for each topic. You can also click on Search, above, to view a complete list of the Help Topics.

- [☒ GENERAL INFORMATION; About DEXS, About Shareware, DEXS Registration](#)
- [☒ DATABASE INFORMATION; Setting up new databases, adding records, searches and reports](#)
- [☒ DOCUMENTATION INFORMATION; complete indexes to DEXS Documentation](#)
- [☒ UTILITY PROGRAMS; Labels Generator and DEXS ASCII Copy Program available for DEXS](#)

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For more information write
CompHaven
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Or, visit our Internet web site
<http://www.krng.com/apps> for the most up-to-date DEXS information.

Thanks for your Interest in DEXS!



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- [GENERAL INFORMATION; About DEXS, About Shareware, DEXS Registration](#)
- [About DEXS](#)
- [About DEXS QuickView](#)
- [About Shareware Software](#)
- [Comparing DEXS Editions](#)
- [Disclaimer of Warranty](#)
- [Exercises to Learn DEXS](#)
- [Getting Started](#)
- [Hardware/Software Requirements](#)
- [Product Services](#)
- [Registering DEXS](#)
- [Shortcuts and Tips](#)
- [DATABASE INFORMATION; Setting up new databases, adding records, searches and reports](#)
- [DOCUMENTATION INFORMATION; complete indexes to DEXS Documentation](#)
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- [☒ GENERAL INFORMATION; About DEXS, About Shareware, DEXS Registration](#)
- [☒ DATABASE INFORMATION; Setting up new databases, adding records, searches and reports](#)
- [☒ Database software description](#)
- [☒ Database Creation/Selection Screen](#)
- [☒ Database Updates](#)
- [☒ Database Search and Reports](#)
- [☒ Database Exports](#)
- [☒ Print Database Description](#)
- [☒ DOCUMENTATION INFORMATION; complete indexes to DEXS Documentation](#)
- [☒ UTILITY PROGRAMS; Labels Generator and DEXS ASCII Copy Program available for DEXS](#)

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- [+ DATABASE INFORMATION; Setting up new databases, adding records, searches and reports](#)
- [- DOCUMENTATION INFORMATION; complete indexes to DEXS Documentation](#)
- [= Adminstrator's Guide](#)
- [+ Project Forms Notebook](#)
- [+ Documents Coding Manual](#)
- [+ Sample Documents Database](#)
- [+ UTILITY PROGRAMS; Labels Generator and DEXS ASCII Copy Program available for DEXS](#)

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- [+ **Labels Generator**](#)
- [+ **DEXS ASCII Copy Program**](#)

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Thanks for your interest in DEXS!



About DEXS

Document & Exhibit System for Lawyers (Ver 2.01c)

DEXS is easy to learn and easy to use Litigation Support Database software. DEXS is a full featured, powerful Windows (tm) database, available in three editions; the Shareware Edition, the Workstation Edition, and the Project Managers Suite.

The Project Manager's Suite comes with a complete set of instructions, forms, and organizational tools required to set up and run a documents coding project. DEXS was designed specifically for litigators, with a minimum of computer jargon and a maximum of easily understood database features. No prior computer database experience is needed to use DEXS.

DEXS is produced by CompHaven/IS
Graphics assistance from VersaGraphics
Programming by G. Tingkang
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E-Mail address: apps@krng.com

visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

Thanks for your Interest and Support!

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For more information, click below to go to the Information File Table of Contents, or other topics of interest:

[Contents](#)

[Getting Started](#)

[About DEXS QuickView](#)



Getting Started

This is a Quick Primer touching on some general points to using DEXS. Click Below to go to the full Table of Contents:

[Contents](#)

Overview of the Documents Database Process

Document and Exhibit System (DEXS) was created to simplify the high volume, document organization process. Documents are coded and stored within the database. Users define search parameters and view all documents that fit within those parameters. For example, a user may search for all documents containing the name "Smith" authored between 01/01/72 and 12/31/82. From the search results, a report is generated which shows the document number, date, title, etc...

Using the Keyboard and the Mouse

With your mouse, you can click on any button or file option to activate the option. The menus can also be accessed by holding down the ALT key while pressing the key with the underlined letter. For example, to access the Import/Export menu, hold down the ALT key while pressing the I key. The same selection can be made by pressing the ALT key and the I key, then using the down arrow to move to a menu choice and pressing the Enter key to select it.

Creating a Documents Database

To create a new documents database, click on the Database Options from the opening screen, then click on Add a New Database from the drop down menu.

Use the Help System !

There are two methods of accessing the Help System. The first is to click on the Help option in the opening screen menu. The Second is to use the F1 key. Move to any screen and press the F1 key to view Help for that subject. To exit the Help System, double click on the program control box, or click on the File menu option and then on Exit.

Entering your Initials

Prior to updating a database, you must enter your initials. To open the initials drop box, either click on the down arrow to the right of the box, or press the ALT + {down arrow} keys. Enter your initials if they are not on the list. Press the Continue button to advance to the Database Update Screen.

Create Leading Zeroes Prior to Using a Database

Prior to working with any database, you must enter Document Number Validation upper and lower limits, under the Update Tables menu option. Enter the Prefix, Beginning Document Number, and Ending Document Number. This function limits the document numbers, and shows DEXS the proper pattern for leading zeroes. For example, if your document numbers for the Prefix "ABC" are seven digits long, enter "1000000" in the Ending Document Number in the Document Number Validation menu option. DEXS counts the number of digits in the Ending Document Number, and pads the data entry document number field with the appropriate number of leading zeroes. For an example, see the sample database.

See Also:

[The Data Entry Fields](#)

[Database Creation/Selection Screen](#)

[Database Updates](#)

[Database Search & Reports](#)

[Database Export](#)

For More Information:

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Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!agraph



Data Entry Fields

Click on the Data Entry field for a complete description.

[Document Number](#)

[Document Date](#)

[Document Type](#)

[Document Title](#)

[Document Characteristics](#)

[Document Subjects](#)

[Document Names](#)

[Comments](#)

The Document Number Field

Description of Document Numbers

Document numbers are the product of two separate components: the Prefix and the Document Number.

The Prefix

The Prefix is a multi-character alpha and/or numeric series assigned to documents as they are received during the production phase of litigation. For example, one thousand documents received from the EPA could be numbered EPA 0000001 - 0001001.

The Document Number

The Document Number consists of four to nine digits that follow the Prefix. Leading zeroes should be included in document numbers to allow for expansion.

The Unit Range

Documents are in a Unit Range when they are clearly attached to each other. Coders will find typical Unit Range documents in many of their batches; such documents are stapled, rubber banded, or clipped together. The relationship is obvious immediately; it either existed when the documents were produced or was made by the staff members responsible for unitizing the documents prior to batching.

The document number on the first page of a grouped set of documents is the beginning Unit Range number and the document number on the final page is the ending Unit Range number. Do not use a prefix for these numbers.

<<Note>>A single, multi-page document will not have a Unit Range, even though it has been stapled or clipped together. The purpose of the Unit Range is to show that two or more individual documents have been attached together.

See Also:

[Search for Document Numbers](#)

Search for Document Numbers

Steps to Search for Sequential Document Numbers

- From the Opening Screen, click on the Search/Print button.
- Click on the Numbers tab.
- Enter the Prefix of the Document Number or Document Range to be searched.
- Enter the Starting Number to be searched.
- Enter the Ending Number to be searched. If you are searching for a single document, enter the same number in both fields.
- Click on a different tab to continue your search or click on the Title Viewer to view the results of your document number search.

See Also:

[Database Search & Report](#)

[The Title Viewer](#)



The Database Search & Print Function

The Purpose of the Search & Print Function

After the coded data has been keyed in, the user can easily use the database to generate customized searches and produce easy to follow printed reports. The Search/Print function can be used at any time after data has been entered in a database. Naturally, the extent of the search results will vary depending on the number of records the database contains.

Steps to Creating a Search

- 1 Click on the Search/Print button on the opening screen.
- 2 From the search screen, click on the tab that corresponds to the field of the search. For example, click on the Date tab if you wish to search for all documents with a certain date. <<Note>> DEXS will not allow the user to access the Title Viewer or Report Formats prior to creating search criteria.
- 3 Click on any other tab to narrow the search criteria. For example, click on the Name tab, and enter a name search parameter. The DEXS system will review all documents in the date sub-set, (from step 2), for that name. Click on the Title Viewer tab to review your search results.
- 4 Continue to narrow the search criteria by clicking on any other tabs that correspond to your search parameters.

For more information on a specific type of search, click on any of the following:

[Document Names](#)

[Document Comments/Titles](#)

[Document Characteristics](#)

[Document Subjects](#)

[Document Types](#)

[Document Numbers](#)

[Document Dates](#)

[Document Posting Date](#)

View Search Results

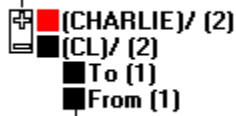
Once all your search parameters have been entered, click on the Title Viewer tab to review the records you have selected. The criteria box shows all search criteria and the Document Titles box displays the titles of all documents that correspond with the search criteria. To review a document, 1) Click on the document title to highlight it, and 2) click on the View Details button. You are able to include or exclude the document by clicking on the selector box.

See Also:

[Title Viewer](#)

The Record Inclusion/Exclusion Tools

Status Indicator



Selector Box

The Status Indicator and Selector Box are the two main tools used for record inclusion/exclusion. The Status Indicator shows whether or not there is underlying information. A "positive" symbol indicates that there is underlying information, while a "negative" symbol indicates that all information is displayed. In the example to the left, "CL" is a name reference. The number in parenthesis is the number of occurrences of "CL" in the database. By clicking on the positive status indicator, the connection code and number of occurrences is revealed. To select an item, click on its black Selector Box. To deselect an item, click on its red Selector Box. A name reference with a black and red Selector Box means that a portion of the underlying information has been selected. Click on the positive Status Indicator to review that information.

Creating a Report

There are many combinations of report formats that can be generated by DEXS. The DEXS default is a standard, all inclusive search report. However, the user is able to include or exclude a variety of fields to customize the report. The report can also be chronologically organized or sorted by document number. To print the report, click on the Print button. DEXS communicates with your network or stand-alone printer, and prints the report in either portrait or landscape, view with your choice of fonts.

For More Information:

E-Mail us on the Internet at:

apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

See Also:

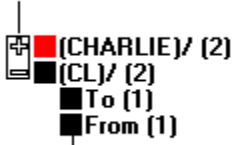
[Generate Reports''''](#)

Search for Document Names

Steps to Search for Document Names

- From the Opening Screen, click on the Search/Print button.
- Click on the Names tab.
- Click on the Update Names button to ensure that all names are available in your search.
- Click on one of the 26 buttons labeled with a letter of the alphabet. This will advance the names table to that location. For example, if you are trying to search for the initials "CL," click on the button labeled with the "C".

Status Indicator



Selector Box

In the example to the left, "CL" is a name reference, and the number in parenthesis is the number of occurrences of "CL" in the database. By clicking on the positive status indicator, the connection code and number of occurrences is revealed. To select an item, click on its black Selector Box. To deselect an item, click on its red Selector Box. A name reference with a black and red Selector Box means that a portion of the underlying information has been selected. Click on the positive Status Indicator to review that information. The Status Indicator shows whether or not there is underlying information. A "positive" symbol indicates that there is underlying information, while a "negative" symbol indicates that all information is displayed.

- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Database Search & Report](#)

[The Title Viewer](#)

The Title Viewer

The Purpose of the Title Viewer

The Title Viewer allows the user to view selected records for inclusion/exclusion. The Title Viewer also allows the user to review the search criteria.

To View a Record

To include a record in your search, click on its Selector Box. If you are unsure if you want the record, highlight the record by clicking on the title, then click on the View Details button. All fields of the document will be shown on screen. If you wish to include the document, click on the Include button or on its Selector Box. To move to a different record, click on either the Next or Previous Button. The Next button moves the focus to the next record of the selected sub-set. The Previous button moves the focus to the previous record of the selected sub-set.

Printing from the Title Viewer

To print from the Title Viewer tab, highlight a record and click on the View Details button. DEXS defaults to include all fields on the record viewer, however, fields may be excluded from the report. To exclude a field, click on any of the field options located between the Close and Next buttons. The field will no longer appear on the report viewer. Click on the Print button to print the record.

See Also:

[Database Search & Report](#)

Search for Key Words in Title/Comment

Key Words in the Document Title & Comments Fields

It is possible to search on any word or combination of words in the Document Title and Comments Fields.

The Document Title is a brief synopsis of the contents of a document. A document title can be captured from the re: line, or from the header of a document. If a title isn't readily available, the coder must create one from the content of the document. The Comments field allows the coder to enter any data that is important but is not a subject or characteristic. This field accepts alphanumeric characters, up to a total of one megabyte of data. To access this field, click on the Comments button along the lower portion of the database update screen.

Wildcard Characters as Search Parameters

You can use wildcard characters to locate text or dates. The question mark (?) stands for any single character in the same position as the question mark. The asterisk (*) stands for any number of characters in the same position as the asterisk. For example,

If you enter this:

?ILL

S*NG

AN

//90

04/01/*

You would find these values:

HILL

BILL

TILL

SPILLING

SPEAKING

SILVER RING

MANAGE

DEFENDANT

All dates in 1990

All April 1 dates

<<Note>> With wildcard characters, you can use either uppercase or lowercase letters.

Steps to Search for Document Titles/Comments Key Words

- From the Opening Screen, click on the Search/Print button.
- Click on the Key Words tab.
- Enter the Key Word. Click on Add Key Word or press Enter and the word is automatically added to the Key Word box. DEXS defaults to search the Title and Comments fields. Click on either field to deselect it. DEXS clears out all Key Words upon your exit from the search/report screen.
- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Document Titles](#)

[The Title Viewer](#)

The Document Title Field

Description of Document Titles

The document title should provide a brief synopsis of the contents of the document. There are two types of document titles: the objective title and the subjective title.

The Objective Title

The objective title is the actual title as it appears on the document. Often it can be captured directly from the re: line or the page header. The objective title should be used whenever possible. If there is no clear title, a subjective title must be used in its place.

The Subjective Title

The subjective title is a coder-created synopsis of the document. Often the first line of the body of the text can serve as a subjective title. Subjective titles are preceded by the backslash character "\".

See Also:

[Search for Key Words in Document Titles/Comments](#)

Search for Document Characteristics

Document Characteristics are predefined physical characteristics of a document. All relevant document characteristics should be incorporated into the DEXS system prior to the coding process.

Steps to Search for Document Characteristics

- From the Opening Screen, click on the Search/Report button.
- Click on the Characteristics tab.
- Click on a characteristic search parameter to include or exclude it from the search. For example:

Selector Box

- ▣ Illegible Document (31)
 - ▣ Handwritten (4)
 - ▣ Poor Original (8)
 - ▣ Poor Photocopy (6)
 - ▣ Other (13)
- ⊕ ▣ duplicate document (1)

Status Indicator

In the example to the left, "Illegible Document" is a characteristic reference, and the number in parenthesis is the number of occurrences of "Illegible Document" characteristics in the database. By clicking on the positive status indicator, the connection code and number of occurrences is revealed. To select an item, click on its black Selector Box. To deselect an item, click on its red Selector Box. A name reference with a black and red Selector Box means that a portion of the underlying information has been selected. Click on the positive Status Indicator to review that information. The Status Indicator shows whether or not there is underlying information. A "positive" symbol indicates that there is underlying information, while a "negative" symbol indicates that all information is displayed.

See Also:

[Update Tables](#)

[The Title Viewer](#)

Update Tables

Why Update Tables

The Update Tables function allows the user or administrative staff to update all the predefined tables such as Subject or Characteristics. These types of tables allow the coder to note important issues relating to the case. These tables should be updated with all relevant issues prior to the coding process. However, they may be updated during the on-going coding process.

Steps to Update Tables

- From the Database Update screen, click on the Update Tables Menu item. <<Note>> Always check with project management prior to updating any tables.
- Click on the type of table you wish to update, for example, the Subjects table.
- Use the Record Scroll Bar in the lower left corner of the screen to move between Subjects.
- Use the second Record Scroll Bar attached to the smaller table to move between the Sub-Subjects. <<Note>> **Some tables have only a single Record Scroll Bar. Use that Record Scroll Bar to move between records.**
- To exit this screen, double click on the program control box, or click on the Close button .

Creating Leading Zeroes with Update Tables|Document Number Validation

Prior to working with any database, you must enter Document Number Validation upper and lower limits, under the Update Tables menu option. Enter the Prefix, Beginning Document Number, and Ending Document Number. This function limits the document numbers, and shows DEXS the proper pattern for leading zeroes. For example, if your document numbers for the Prefix "ABC" are seven digits long, enter "1000000" in the Ending Document Number in the Document Number Validation menu option. DEXS counts the number of digits in the Ending Document Number, and pads the data entry document number field with the appropriate number of leading zeroes. For an example, see the sample database.

See Also:

[The Subjects Field](#)

[The Characteristics Field](#)

The Document Subjects Field

Description of Document Subjects

Document Subjects are a predefined set of topics that allow a user to search for all documents that pertain to a specific topic. All relevant Subjects should be incorporated into the data entry system prior to the coding process. Subjects are composed of two sections, the Subject and the Sub-Subject. The Subject is a broad descriptor, for example, "Leaks." The Sub-Subject is a more specific topic relating to the Subject type. For example, a Sub-Subject for the Subject "Leaks" could be "Acid Leaks" or "Leaks to Sewer."

Entering Document Subjects

To enter Document Subjects, click on the Subjects button. The right portion of the screen will be dedicated to Subject entry. Click on the down arrow of the first Subject entry box for a drop down list of predefined Subjects. Click on the appropriate pre-defined Subject type. Next, click on the down arrow on the Subject entry box immediately below the current one. Click on the appropriate Sub-Subject, or create a new one. Continue this procedure until all Subjects and Sub-Subjects have been entered. <<Note>> Always get new Sub-Subjects approved by project management prior to adding them to your system.

Deleting Document Subjects

To delete a Document Subject, click on the grey button to the left of the Document Subject, and press the delete key on your keyboard.<<Note>> This procedure does not delete the Subject from the system, it merely deletes the Subject from that particular coded record.

Printing All Document Subjects

To print a current list of all document subjects:

- 1) From the Update Screen, click on the Update Tables menu item.
- 2) Click on the Document Subjects item in the drop box.
- 3) Click on the Print Table button. A report listing all subjects and sub-subjects will automatically be generated and printed.

It is useful to familiarize yourself with all documents subjects prior to the initiation of the coding process.

See Also:

[Searching for Document Subjects](#)
[Update Tables](#)

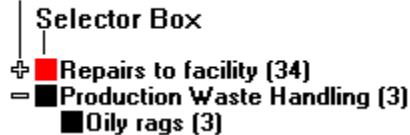
Search for Document Subjects

A Document Subject is a pre-defined topic that is relevant to the case. All relevant document subjects should be incorporated into the DEXS system prior to the coding process. However, Subjects may be added during the coding process.

Steps to Search for Document Subjects

- From the Opening Screen, click on the Search/Print button.
- Click on the Subjects tab.

Status Indicator



A list of all document subjects will appear. Click on a Selector Box to select a document Subject to include in your search criteria. You may select a single Subject, or multiple subjects. The number in parenthesis indicates the number of documents in the database that have been coded with that Subject. Click on the "positive" Status Indicator to review all Sub-Subjects within a Subject type. In the example to the left, "Production Waste Handling" is the Subject, and "Oily rags" is the Sub-Subject

- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Update Tables](#)

[The Title Viewer](#)

Document Characteristics

Description of Document Characteristics

Document Characteristics are a predefined set of characteristics that would allow a user to search for all documents that have certain characteristics. All relevant characteristics should be incorporated into the data entry system prior to the coding process.

Examples of document characteristics are; marginalia, poor copy, illegible copy, or a duplicate document.

Entering Document Characteristics

To enter Document Characteristics, click on the Characteristics button. The right portion of the screen will be dedicated to Characteristic entry. Click on the down arrow of the first Characteristic entry box for a drop down list of predefined Characteristics. Click on the appropriate pre-defined Characteristic type. Next, click on the down arrow on the Characteristic entry box immediately below the current one. Click on the appropriate Sub-Characteristic, or create a new one. Continue this procedure until all Characteristics and Sub-Characteristics have been entered. <<Note>> Always get new Sub-Characteristics approved by project management prior to adding them to your system.

Deleting Document Characteristics

To delete a Document Characteristic, click on the grey button to the left of the Document Characteristic, and press the delete key on your keyboard.<<Note>> This procedure does not delete the Characteristic from the system, it merely deletes the Characteristic from that particular coded record.

Printing All Document Characteristics

To print a current list of all document characteristics:

- 1) From the Update Screen, click on the Update Tables menu item.
- 2) Click on the Document Characteristics item in the drop box.
- 3) Click on the Print Table button. A report listing all characteristics and sub-characteristics will automatically be generated and printed.

It is useful to familiarize yourself with all document characteristics prior to the initiation of the coding process.

See Also:

[Searching for Document Characteristics](#)

[Update Tables](#)

For More Information:

E-Mail us on the Internet at:

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Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

Search for Document Types

The Document Type is a pre-defined classification of documents. For example, all types of internal correspondence documents could be represented as Type "memorandum". The Document Type simplifies the coding process by reducing the amount of keystrokes to define a document. All document types should be included in the DEXS system prior to the coding process.

Steps to Search for Document Types

- From the Opening Screen, click on the Search/Print button
- Click on the Type tab.

Selector Box

■ MEMORANDUM (42)
■ CORRESPONDENCE (6)
■ ADMINISTRATIVE FORMS (2)
■ REPORTS, STUDIES, PLANS (5)

A list of all document Types will appear. Click on a Selector Box to select a document type to include in your search criteria. You may select a single Type or multiple Types. The number in parenthesis indicates the number of documents in the database that have been coded with that Type.

- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Database Search & Report](#)

[The Title Viewer](#)

[Update Tables](#)

Search for Document Dates

The Document Date is the creation date of the document.

Wildcard Characters in the Date Field

You can use wildcard characters to locate text or dates. The question mark (?) stands for any single character in the same position as the question mark. The asterisk (*) stands for any number of characters in the same position as the asterisk. For example,

If you enter this:

?ILL

S*NG

AN

//90

04/01/*

You would find these values:

HILL
BILL
TILL

SPILLING
SPEAKING
SILVER RING

MANAGE
DEFENDANT

All dates in 1990
All April 1 dates

<<Note>> With wildcard characters, you can use either uppercase or lowercase letters.

Steps to Search for Document Dates

- From the Opening Screen, click on the Search/Print button.
- Click on the Date tab.
- Enter the Beginning Date for your date search, using the format MM/DD/YY, including leading zeroes, e.g. 01/08/94.
- Enter the Ending Date for your date search. If you want a single date search, rather than a date range, enter the same date in the beginning and ending date fields.
- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Document Dates](#)

[Title Viewer](#)

The Date Field

Description of Document Dates

The document coder's goal is to enter the date that best represents the last time a document was prepared, edited, approved for issuance, or reissued. Coders will often find documents with no clear dates, while other documents may have many dates.

Format of Document Date

The date field requires six characters: MM/DD/YY.

Priority of Document Dates

The goal for coding is to capture the date that reflects the most recent work on the document. This date is considered the effective "creation" date. When a clear origination date is present, e.g., a date appearing on a letter above the addressee/salutation lines, that date is entered in the date field.

The following criteria should be used to determine the proper date if no clear date is available:

- 1 Choose the most recent revision date.
- 2 Select the latest signature date.
- 3 Code the creation date stated in the document body.
- 4 Find the most recent date referenced in the text.
- 5 Capture the latest date in a date range.
- 6 Select the last revision date.

The Irregular Date Flag

Often dates are either partially illegible, entirely illegible, or not present. In this case, enter 01/01/00 in the date field, and explain the problem with the date in the title or comment field. If project management has made irregular dates a characteristic, enter the appropriate characteristic and sub-characteristic. For more information on dates and the irregular date flag, see Chapter 3 of the Coder Manual.

See Also:

[Search for Dates](#)

Search for Posting Date

The Document Posting Date

The document posting date is the date that a document was entered into the DEXS system. Searching this field gives the user a chronological report for any portion of the coding process.

Steps to Search for Document Posting Date

- From the Opening Screen, click on the Search/Print button.
- Click on the Posting tab.
- Select a coder's initials if that is part of your search criteria. Leave the coder initials blank if you want to include all coders.
- Enter the beginning and ending posting dates. If you wish to search for a single date, enter the same date in both fields.
- Select the type of entry to be located. DEXS defaults to include all three types of data entry: Update, New Entry, and Import.
- Click on a different tab to continue your search, or click on the Title Viewer tab to review your search results.

See Also:

[Update Tables](#)

[The Title Viewer](#)

Generate Reports

Types of Report Formats

There are four basic types of reports that fulfill different requirements; the chronologically sorted detail report, the numerically sorted detail report, the pull sheets report, and the exhibits tracking report. To print only those records selected in the Title Viewer, click on the "Selected" option button. To print all records in the database, click on the "All" option button.

The Chronologically Sorted Detail Report

The chronologically sorted report organizes records in ascending date order. It is useful if you are trying to develop a chain of events log or for determining the time when certain knowledge became available to a party in a litigation.

The Numerically Sorted Detail Report

The numerically sorted report organizes records in ascending document number order. If your document numbers include an alphabetic source code, the records are grouped by that source code. All groups of prefixes are sorted in alphabetical order, then in document number order. This type of search is useful for pulling documents that have been organized in a similar manner.

Pull Sheets

The Pull Sheets report format is specifically for pulling documents. The report includes the document number, document type, document date, and the document unit range. A description is also part of the pull sheet report. CompHaven recommends that the name of the individual, or some other search criteria, be included in the description to identify the document pull. If three searches all call for a certain document, it is useful to know which search has that document.

The Exhibits Tracking Report

The exhibits tracking report is used after a Characteristics search for exhibits has been performed. It creates a report of all selected exhibits in ascending exhibit number order.

The Report Fields

The search report can be customized to fit the user's needs or requirements. By default, all coding fields are included on the search report. However, any field can be included or excluded. Simply click on a field in the Include Box to exclude or include it. A custom title can be added to your report in the Enter Report Description box. The Database Title can also be modified to suit your needs.

Configure your Printer

To configure your printer, click on the Print Setup button. From this screen, you will be able to select which printer will print the report, orient the report in portrait or landscape view, and choose the paper size and source.

Select a Report Font & Print

The DEXS font default is bolded 8 point Courier. To change the report font, click on the Font Button. All installed fonts by will be displayed. Choose a font, and select the font size and weight. To print the report, click on the Print button.

See Also:

[The Title Viewer](#)

For More Information:

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apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

The Document Type Field

Description of Document Types

Document Types are a predefined set of types that would allow a user to search for a specific type of document. All relevant types should be incorporated into the data entry system prior to the coding process.

Entering Document Types

To enter a document type, click on the down arrow button located in the document type entry box. A drop down list will supply a predefined set of types. Click on the appropriate document type.

See Also:

[Searching for Document Types](#)

[Update Tables](#)

Doc Names

Description of Document Names

There are four basic types of Document Names: Initials or Nicknames, Personal Names, Company Names, and Illegible Names. A front slash "/" is automatically added to the end of all names, except for company names.

A front slash "/" must precede all company names.

Initials or Nickname

When initials or a nickname are present on a document, code them in parenthesis, e.g. (CL).

Personal Names

Personal Names are captured using the format Last Name, First Name, Initial. For example, Mr. Vern Z. Quackenbush would be captured as Quackenbush, Vern, Z.

First Names Only

When only a first name is present, code the name in parenthesis, (CHARLES).

Company Names

All Company Names must be coded with a backslash preceding the company name. Company Names are coded as they appear in the document, e.g. /RAPTOR.

Illegible Names

Illegible Characters in names are to be coded using the pound symbol "#". For example, a name with a blurred last name would be coded as ##ith, Jan, T.

Linking Personal Names with Company Names

Linking personal names with company names is accomplished through the use of the frontslash "/". For example, John Holly of the law firm, Thorn, Williams & Suggs would be captured as Holly, John/Thorn Williams & Suggs.

Connection Codes

Connection codes reflect the status of the individual within the document. For example, a memorandum is sent to Virginia Thomas. The coded name, Thomas, Virginia, is coded with the "To" connection code selected. Likewise, the author of the memo is coded with the "From" connection code selected, and any names mentioned in the document are coded with the "Mention" connection code selected.

The connection codes are To:, From:, CC:, Attend:, and Mention:, and are found in the lower left hand corner of the name entry screen. To code an individual with a connection code, 1) click on a connection code, 2) type a name into the name input box, or click on it in the names box. Notice that the person's name appears in the box corresponding to the connection code.

See Also:

[Search for Document Names](#)

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The Comments Field

A Description of the Comments Field

The Comments field allows the coder to enter any data that is important, but that is not a subject or characteristic. This field accepts alphanumeric characters, up to a total of one megabyte of data. To access this field, click on the Comments button along the lower portion of the database update screen. The comments field can be searched for key words using the search for Key Words function.

See Also:

[Search for Key Words in Document Title/Comments](#)



Database Creation\Selection Screen

Summary of Database Options

The database options provide the user with the opportunity to add, open, compact, encrypt, repair, or delete a database. The user may also print a detailed description of the database tables.

Database Selector Panel

The database selector panel lists all databases in the system. To access a database, the user simply clicks on the name of the database.

The Update Function

Update

This button allows the user to enter new records into a database, or to edit existing records for the selected database.

The Search & Print Function

Search/Print

This button allows the user to search the selected database and print the results.

The Current Database Panel

The current database panel provides all necessary information to familiarize a user with a case and its corresponding database. It lists the database name, the database file name & size, the date the database was opened, the lead attorney, the case name, and a case description. To access these fields, position your cursor within a field and click. The information is automatically saved when the user exits this screen.

Exit the Database

To exit the database, simply click on the Exit button.

See Also:

[Add a New Database](#)

[Open an Existing Database](#)

[Compact a Database](#)

[Repair a Database](#)

[Delete a Database](#)

[Print Database Description](#)

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Add a New Database

Steps to Add a New Database

You need to "Add a Database" each time you begin a new database. To do this...

- From the opening screen, click on Database Options.
- Click on the Add a New Database menu option.
- Enter the database filename of the new database. The database filename must be limited to eight characters, or less, with the file extension of ".mdb". For example, the sample database filename is RAPTOR.MDB. Click on the Enter button once you have entered the filename of your database. Next, enter the new database name. The database name appears in the database selector window. It can be up to 31 characters long. Enter the name and click on OK. You will then need to enter the case name, the database opening date, the lead attorney, and a short description of the case, in the current database panel. Click on each field to add or modify the information.

See Also:

[Delete a Database](#)

[Open an Existing Database](#)

Delete a Database

Steps to Delete a Database

- In the database selector panel, highlight the database you wish to delete by clicking on it.
- Click on the Database Options Menu in the opening screen.
- Click on the Delete Database Option.
- DEXS automatically deletes the database from the database selector panel.

Open an Existing Database

Steps to Opening an Existing Database

- Click on the name of the database that you wish to open.
- Click on the Database Options Menu in the opening screen.
- Click on the Open Existing Database Option.

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Compact a Database

Why Compact a Database

Databases continually expand. Compacting the database is necessary to minimize the required hard disk space. Compacting the database also defragments the disk file, which speeds up your system. We recommend that the database be compacted any time new records are added to the system. You must close the database file prior to compacting it.

Steps to Compact a Database

- Highlight the targeted database in the database selector panel.
- Click on the Database Options menu item in the opening screen.
- From the drop down menu, click on the Compact Database option.

From this point, the DEXS system automatically compacts the database. The compacted database size is displayed at the conclusion of the process.

See Also:

[Repair a Database](#)

Repair a Database

Recovering a Damaged Database

If DEXS closes down without closing the database, or if your system unexpectedly closes down, you'll need to repair your database. If DEXS closes without closing the database, you will receive a message that the database is in need of repair. Click the OK button on the message box to repair the database. If your system unexpectedly shuts down, you'll need to follow these steps to repair your database:

Steps to Repairing a Database

- Click on the name of the database that is in need of repair.
- Click on the Database Options Menu in the opening screen.
- Click on the Repair Database option.
- A message box will appear stating that the database has successfully been repaired.

Print Database Description

Database Description

The Database description is a list of the database specifications. Each database has a specific name, file name, description, etc. To help organize multiple databases it is useful to be able to review the specifications of all your databases.

How to Print

- From the opening screen, click on the Database Options menu item.
- Click on the Print Database Description item. Print the database description for the current database or for all databases.
- DEXS will automatically generate and print a database description report.



Database Updates

The Purpose of Database Updates

The purpose of database updates is to add records to the database. Click on the Update button on the opening screen to advance to the update database screen.

Navigating Through the Update Database Screen

There are two methods of moving through the database update screen. The user can press the TAB key to move from field to field, or the user can move instantly to any field by clicking on that field.

Summary of the Menu Options

The menu options on the Update Database Screen include QC Reports, Edit/Find, and Update Tables.

QC Reports

Quality Control Reports allow the user to print a coded data report that will be edited by a Quality Control editor. The resulting corrections are entered by the coder.

The Edit/Find Function

The Edit/Find function allows the user to search for a word or number located on a certain document. It can be used in a variety of fields, such as the document number or title. It can be used to locate text or numbers. For more information, see the Edit/Find help topic.

The Update Tables Function

The Update Tables function allows the user or administrative staff to update the Subjects, Characteristics, Coder Initials, Types, Document Number Validation, and the Names tables. These tables limit the input of information to only important issues relating to the case. These tables should be updated with all relevant issues prior to the coding process. However, coders may update the Sub-Subjects and Sub-Characteristics tables with new entries while coding.

Records Maintenance

After a record has been entered into the DEXS System, the user must press the Save Button.

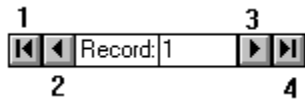
A rectangular button with a grey gradient and a thin border, containing the word "Save" in a bold, sans-serif font.

The Save Button saves the current record and advances to the next record.

The user may also choose to delete a record.

A rectangular button with a grey gradient and a thin border, containing the word "Delete" in a bold, sans-serif font.

To delete a record, move to that record and click on the Delete Button.



To move between records, use the Record Scroll Bar. The Record Scroll Bar, located in the lower left corner of the database update screen, allows the user to move between database records. Button number 1 moves the user to the first record of the database. Button 2 moves the user one record back. Button 3 moves the user one record forward. Button 4 moves the user to the final document in the database. The record number is displayed between buttons two and three.

See Also:

[Data Entry Fields](#)

[QC Reports](#)

[Edit/Find](#)

[Update Tables](#)

For More Information:

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QC Reports

What is a QC Report?

Quality Control Reports allow the coder to print a coded data report that will be edited by a Quality Control editor. All QC are then entered by the coder.

How to Print a QC Report

From the Database Update screen, click on the QC Reports menu option. Click on Print. The program will ask you for the Batch Number (Optional), Prefix, Beginning Document Number, and Ending Document Number. The system will generate a QC report with those parameters. Click on the Print Button to print the report.

Entering QC Edits

Click in the Beginning Document Number field. Use the Edit/Find function to locate the correct record. Enter the edit in the proper field. To delete a subject or characteristic, click on the grey button to the left of the subject or characteristic. Press the delete key to delete it.

Edit/Find Function

How to use the Edit/Find Function

The Edit/Find function allows the user to search for a word or number located on a specific document.

To Find Text:

- 1 Position the cursor in the field where you want to begin the search, e.g., click in the Document Number field if you wish to search for a document number. Click once in the field with the RIGHT mouse button, or
- 2 Click on Edit and Find options on the menu.
- 3 In the Find What box, enter the text or number you wish to find.
- 4 Click on the Match Case option if you wish to exactly match the capitalization.
- 5 Click on the proper search Direction. If you click on the UP option, DEXS will search all records between the current record and the beginning record. If you click on the Down option, DEXS will search all records from the current record to the end of the file.
- 6 Click on the down arrow in the Where field to specify the type of search. The options include, Match Whole Field, Start of Field, and Any Part of Field. Select Start of field if you know that the text you are searching for is at the beginning of the field. --WARNING-- If you select Any part of field and search for a word like "pill," DEXS will find all words containing "pill," such as "pillar" or "spill."
- 7 DEXS usually searches the current field only, because it is faster to search only one field. If you wish to search all fields, click on the All Fields option in the Search In option group.
- 8 Click on the Find First button to locate the first occurrence of your search term. If it is not correct, click on the Find Next button to find the next occurrence of the search term.
- 9 Click on the Close Button to exit the Find function.

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Database Export

The Export Function

CompHaven's Export Database Records function is designed solely to provide you with a simple means to export records from any one CompHaven DEXS system into any other DEXS system. It is specifically not a means for traveling between different software packages and CompHaven's DEXS. This is because operating across platforms is based on the design of the platform itself, in this case, Access.

The export option copies records from one database to another. It does not move the records.

The Export function involves a sophisticated multi-tasking process which may take some time, depending on the amount of records. We suggest that if you are exporting a large amount of data, do it over your lunch break or overnight.

Steps for Exporting Data From the DEXS Database

To export data from your database, follow these steps:

- From the Search\Print function, select the records you wish to export from your database.
- Click on the Export button in the Generate Reports tab.
- Enter the name of the target file to receive your data.
- Click on the Export button to begin exporting the data.
- <<Note>> Prior to working with an exported database, you must enter Document Number Validation upper and lower limits, under the Update Tables menu option. Enter the Prefix, Beginning Document Number, and Ending Document Number. This function limits the document numbers, and shows DEXS the proper pattern for leading zeroes. For example, if your document numbers for the Prefix "ABC" are seven digits long, enter "1000000" in the Ending Document Number in the Document Number Validation menu option. DEXS counts the number of digits in the Ending Document Number, and pads the data entry document number field with the appropriate number of leading zeroes. For an example, see the sample database.

The Database Conversion Function

CompHaven can create a custom conversion program to import records from another database format into DEXS. Contact CompHaven for more information about options for custom Database Conversions.

CompHaven
P.O. Box 50285
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About DEXS QuickView

DEXS Comes with an on-line quick operations overview.

Browse around in the QuickView: Click on the QuickView Icon to access a self-paced Once-Around-The-Block tour of DEXS. Use your mouse to click on fields, titles, and data, to display corresponding descriptions. You can also practice entering data in the Data Entry screen; all entries are deleted when you exit the program. The QuickView takes about 10 - 20 minutes to complete. You can exit at any time.



About Shareware Software

CompHaven Information Systems, Inc., statement about Shareware

Shareware is a distribution method, not a type of software. Shareware is software distributed to the public to be used on a trial basis. You can copy and distribute shareware to other people provided you do not charge a fee. Authorized vendors may distribute the software subject to certain conditions.

Shareware is copyrighted software. Users are allowed to install and use shareware for a certain time period. At the end of the time period, the users are required to either register the shareware or discontinue using it. Shareware is not free software. Shareware must be registered and paid for if you continue to use it.

This software, DEXS Shareware Edition, is fully functional litigation support shareware. DEXS Shareware Edition is copyrighted by Comphaven Information System, Inc. 1994-1996. DEXS Shareware edition permits you to install and use it before you buy it or discontinue using it. You can install DEXS Shareware Edition software and use it for 30 days. You are required to register (pay for) your copy of DEXS Shareware Edition or delete it from your computer after the 30 day trial period.

When you register DEXS Shareware Edition, you will need to choose to receive either DEXS WorkStation Software or the DEXS Project Manager Suite. Neither DEXS WorkStation Software nor DEXS Project Manager Suite are shareware; you can not copy and/or distribute these CompHaven products. One registration fee will license one copy for use on any one computer at any one time. Network and site licenses are available from CompHaven.

We encourage you to pass a copy of DEXS Shareware Edition along to your friends and associates for evaluation. Please encourage them to register DEXS if they use it beyond the 30 day trial period.

Vendors can sell copies of DEXS Shareware Edition and/or include it in on any CD-ROM or in other package provided the vendor sends notification to CompHaven at P.O. Box 50285, Bellevue, WA 98005-0285 of such distribution.

DEXS Shareware Edition can not be sold on retail racks without the written permission of CompHaven.

The computer files which make up DEXS Shareware Edition cannot be modified or changed in any way and must be distributed together as a set as defined in the Vendor.Doc distributed with this shareware. Individual files from the set cannot be sold separately. Do not alter DEXS or distribute any part of DEXS with an unrelated program.

Individual sets of DEXS Shareware Edition distribution disks cannot be sold for more than \$20 per set without the written permission of CompHaven.

The DEXS Shareware Edition must be represented as shareware, and a description of the shareware concept be clearly displayed in conjunction with any promotional materials. The explanation of the shareware concept must make it clear that with shareware an additional registration fee is required if users continue to use the software.

Any person, company, or group distributing and/or selling copies of DEXS Shareware Edition must stop doing so upon receipt of written notice from PNL/IS.

The conditions for distributing DEXS Shareware Edition are subject to change with the release of

new versions of the software.

Registering DEXS



To register DEXS, return to the Windows Program Manager, and Click on the Register DEXS Icon, like the one to the left. Next, Click on the Register DEXS button.

You will find a complete on-line registration system to register DEXS.

Or, you can visit our Internet site. Our internet address is:
<http://www.krng.com> From the home page, follow the link labeled
Software Solutions

Using our Internet web site, you can directly register your copy of DEXS on-line, by a 800 toll free phone call, by FAX, or by E-Mail.

If you have any questions about this shareware policy, contact CompHaven at:

CompHaven
P.O. Box 50285
Bellevue, WA 98015-0285

or E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

Thanks!



Comparing DEXS Editions

This screen includes packing lists for each of the Edition of DEXS, so you can compare the Features of each Edition. For more information on any of the individual components, click on "Search", above.

Shareware Edition

The Shareware Edition of DEXS includes the following:

- DEXS Database System is fully functional litigation support software with On-Line User Help and On-Line documents coding instructions.

DEXS WorkStation Software

Click below for more information on the DEXS -WorkStation Software

[DEXS WorkStation Software](#)

The DEXS WorkStation Software includes the following:

- DEXS Database Software System; the most current version of fully functional litigation support software, with extended on-line Help system.
- On-Line Electronic Support is pending.
- Product Upgrade News; regular mailings including information about product upgrades and pending new products.

Project Managers Suite

Click below for more information on the DEXS Project Managers Suite

[DEXS Project Managers Suite](#)

The Project Managers Suite includes the following:

- DEXS Database Software System; the most current version of fully functional litigation support software, with extended on-line Help system.
- DEXS Administrator Guide; including complete information on project set-up and management, database set-up and maintenance, costs estimating, coder training program, and more.
- Documents Coding Manual; expanded hardcopy of the coding manual, with additional instructions and examples with the coding rules found on-line.
- Project Forms Notebook; most frequently used project forms in hardcopy and on-disk in word processing format.
- Sample Documents Database; an expanded sample database (98 additional documents) used to train coders and explore DEXS.
- Labels Generator Utility Software; produces an assortment of different kinds of labels used in litigation, including ascending document number labels.
- DEXS ASCII Copy Utility Software; used to copy DEXS records to a file in ASCII format.
- On-Line Electronic Support;
- Product Upgrade News; regular mailings including information about product upgrades and pending new products.

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Click on "File", then "Print" above to print this topic.



DEXS - WorkStation Software

DEXS is released and can be registered in two Editions:

- Project Managers Suite
- DEXS WorkStation Software

DEXS WorkStation Software - Contents

The WorkStation Software is designed to supplement the Project Managers Suite. Your firm will need additional copies of the DEXS database software as you add coding workstations to your coding project. The WorkStation Software is packaged and priced to allow you to cost-effectively expand the size of your coding operation, without buying multiple copies of the project management materials and utility programs.

The DEXS WorkStation Software includes the following parts:



As a registered User, you will be authorized to make unlimited use on one computer of the DEXS Database Software system. DEXS includes everything found in the Unregister Shareware Edition including fully functional database management tools, the Data Entry program, and the Search and Reports program. You will receive the most current version of the DEXS database software when you register.



DEXS Help

DEXS Help System includes revised and expanded Help contents, and does not include the promotional materials found in the Help system distributed with the Unregistered Shareware Edition.



Product Services

Product Support; Entitlement to three months of free unlimited product support. Product Support is only available for registered users of WorkStation Software or the Project Managers Kit.



Product Updates

Product Updates and New Product information: All registered users of the Coder Edition and Project Managers Editions are included on the CompHaven Newsletter mailing. You will be notified

of current and soon-to-be-released product upgrades, and new products in the works.

Another option for registering DEXS, is to purchase the Project Managers Suite. The Project Managers Suite includes a larger set of Project Management Documentation, an expanded Samples Database, an expanded hardcopy of the Coding Manual, and two software utility programs; Labels Generator, and DEXS ASCII Copy Program. Click below for information on the Project Managers Suite.

[DEXS Project Managers Kit](#)

For More Information:

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DEXS Project Managers Suite

DEXS Project Managers Suite- Contents

The DEXS Project Managers Suite includes everything you and your computer need to build successful documents databases, including:

DEXS Database Software



As a registered User you will be authorized to make unlimited use on one computer of the DEXS Database Software system. DEXS includes everything found in the Unregister Shareware Edition including fully functional database management tools, the Data Entry program, and the Search and Reports program. You will receive the most current and complete version of the DEXS database software when you register. For more information about the DEXS database Software, Click Below:

[DEXS database Software](#)

DEXS On-Line Help



DEXS Help

DEXS Help System includes revised and expanded Help contents, and does not include the promotional materials found in the Help system distributed with the Unregistered Shareware Edition.

Administrators Guide



DEXS Administrators Guide including complete information on Database Design, Project Planning, Cost Estimating and Time Estimating, Documents Organization and handling, Coder Hiring and Training, Database set-up and use, search and printing reports, Quality Control, Accuracy Audits, and much more. For more information about the Administrators Guide, Click Below:

[Administrators Guide](#)

Project Forms Notebook



Project Forms Notebook: DEXS includes 22 sample forms you will need to keep your project on track. From the Process Flow Chart through the Database Revision/Error Correction Form, DEXS has the forms you need. These forms are provided in hardcopy, and on disk. For more information on Project Forms, Click Below:

[Project Forms Notebook](#)

Documents Coding Manual



Documents Coding Manual includes time-tested, case-hardened coding rules for every field. It includes expanded sections for specific fields, and is open-bound, to allow you to easily customize the coding rules for specific cases. For more information about the Coding manual, Click Below:

[Coding Manual](#)

Sample Documents Database



Sample Documents Database is a complete sample coding database, pre-installed, and ready to review. A hardcopy of each of the documents is included, along with the Sample Noteook. This sample is ideal for training document coders and for exploring all the features of DEXS. The Sample Database distributed with the Project Managers Kit includes 98 more documents than the sample database included in the Unregistered Shareware and WorkStation Software . Click below for more information on the Sample database:

[Sample Documents Database](#)

Database Software Utilities



Labels
Generator



Labels Help

Labels Generator: This program prints 12 different labels for documents management, including Ascending Document Number Labels. Click Below for more information about Labels Generator:

[Labels Generator](#)



DEXS ASCII
Copy

DEXS ASCII Copy Program is designed to allow you to copy a database, or a selected subset of a database to a seperate file in an ASCII format. Click below for more information:

[DEXS ASCII Copy Pogram](#)

Product Services



Product Support Entitlement to three months of free unlimited product support. Product Support is only available for registered users of DEXS WorkStation Software or the Project Managers Kit.



Product Updates and New Product information: All registered users of the DEXS WorkStation Software and the Project Managers Suite are included on the CompHaven Newsletter mailing. You will be notified of current and soon-to-be-released product upgrades, and/or new products in the works.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



Database Software Description

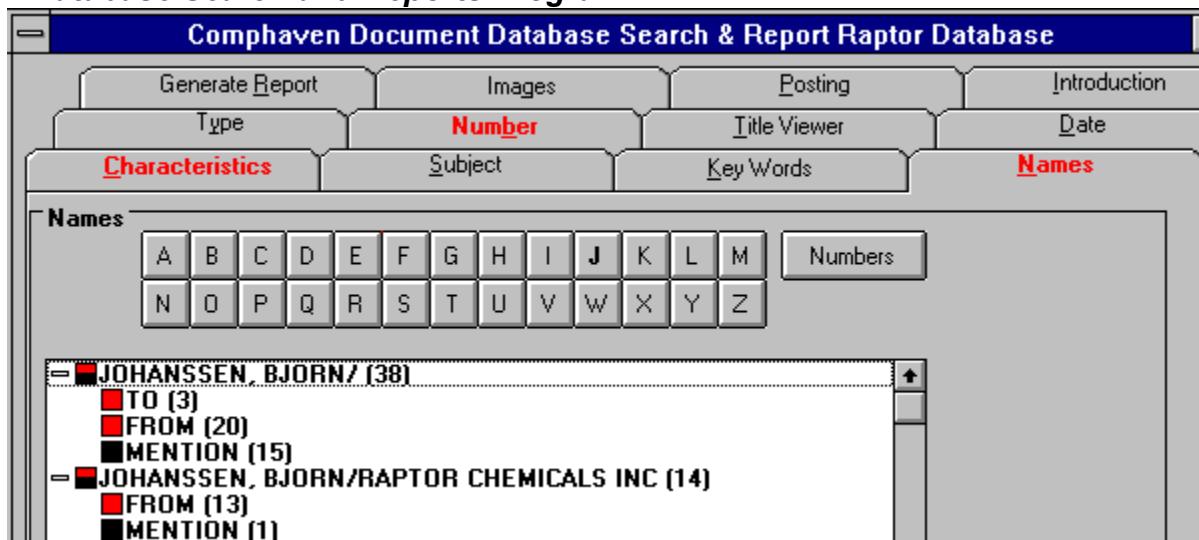
The Litigator's Documents Database Software System

DEXS was developed using state of the art Windows (tm) software, extensive, intuitive menus, and instantly accessible Help/Instructional screens. DEXS is designed to be flexible; it can be customized to meet the needs of a wide range of cases. Computer Systems Managers will also appreciate the strong foundation used to build DEXS. The .MDB file format allows in-house programmers easy access to DEXS' underlying framework so they may build onto it in the future.

DEXS Database Update Program

DEXS makes extensive use of user definable data lookup tables to Add, Modify, and Delete information on the database. The lookup tables define what can be entered in the fields by the coders. Lookup Tables can increase coder productivity by as much as 30% by allowing the coders to enter full names using only a few keystrokes. In other programs coders would have to key in each character of each name every time it was entered on the database. Coder accuracy also increases dramatically when the coder selects from a list rather than continually re-entering the same data.

Database Search and Reports Program



With DEXS, searches are accomplished by clicking on what you want and viewing the results. First, point on the tab for the field you want to search; click on the names, or document types, or other combination of data in the fields to define your search. Click on the Title Viewer tab to preview the records resulting from your search. You can use the Viewer to print records individually and/or selectively exclude records from the full Search Report. Third, click on the Reports tab to customize your report and to print or export the selected records

With DEXS, you find documents quickly, accessing materials by the fields and/or terms in the fields. Litigators appreciate the fact that the DEXS Search and Reports program lists all the information on

the database along with a count of occurrences, so you don't go looking for data that's not there. Once the right documents are located, you can quickly create a printout, copy the records to another database, or copy the records to a file in ASCII format.

DEXS provides instant On-Line Help

Document coders have immediate access to complete, on-line coding rules for each field. DEXS users can get on-line, step by step help to search the database and print reports.

Click below to return to the Table of Contents...

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[coder initial](#)

For More Information:

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Coder Initials

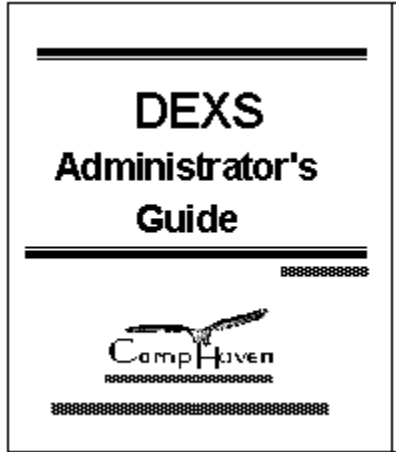
Prior to updating a database, you must enter your initials. To open the initials drop box, either click on the down arrow to the right of the box, or press the ALT + {down arrow} keys. Enter your initials if they are not on the list. Press the Continue button to advance to the Database Update Screen.



Administrator's Guide

DEXS - Document and Exhibits Database System

The Administrator's Guide is included in the Project Manager Suite.



The Guide includes instructions on database design, cost estimating, steps to screen, organize, and prepare documents for coding, and guidelines for coder hiring and training, including job descriptions. The guide also includes complete instructions for searching the database, and printing database reports. It is divided into five parts, with chapters corresponding to each step of the Database Creation Process Flow Chart.

- Part 1 shows you how to install the software, and provides an overview of each of the Components included in the DEXS Project Manager's Edition.
- Part 2 focuses on Tasks for Developing an Effective Database, with chapters on Design and Development of the database, Time/Cost Budgeting, and Project Security.
- Part 3 discusses the process of Preparing the Documents for Data Entry, with chapters on Document Production, Organization, Unitization, Documents Screening, and Batching Documents for Coding.
- Part 4 centers on Tasks to begin Coding On-Line, including chapters on determining Levels of Treatment for Coding (Indexing, Full, or Cluster Coding), Coder Hiring and Training, Adding a New Database, and Exporting Database Records to other DEXS databases.
- Part 5 review Using the Database, with chapters on Searching the Database, Formatting and Printing Database Reports, Auditing the Accuracy of the Database, Tracking Exhibits, and Database maintenance.

The Administrator's Guide saves you time and money with its clear coverage of the database

development process. The Guide is packed with practical information for managing your projects.

Adminstrator's Guide - Table of Contents

Introduction to the Administrator's Guide

Using the Documentation: Step-by-Step

Part 1: Tasks to Perform When You Open the Package

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System Requirements

Product Installation

Getting Familiar with DEXS

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Nine Essential Guidelines for Unitizing.

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Sample Screening Criteria
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Hot Document Screening & Prioritizing
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Chapter 7. Batching Documents for Coding
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Chapter 9. Coder Hiring and Training.
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Coder Hiring Guidelines
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Coder Training
Introducing the Work Space and Process Flow.
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Coder Training with the Sample Database.
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Repair a Database
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Part 5: Tasks for Using the Database

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- Documents Transfer Log
- Box/Batch/Code/QC Logs
- Database Revision/Error Correction Form

For More Information:

E-Mail us on the Internet at:

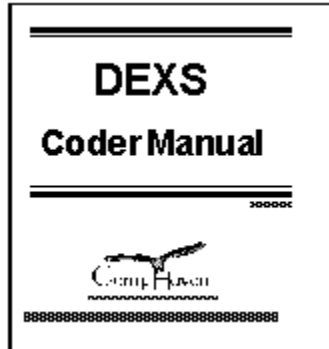
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



Coding Manual

DEXS - Document and Exhibits Database System



The Project Manager's Suite includes an expanded hard copy of the Coder Manual. The Coder Manual includes time-tested, case-hardened coding rules for every field. It is open-bound, to allow you to easily customize the coding rules for specific cases. The Coder Manual also includes a complete system to Quality Check the coders work. For the Manager, Chapter 15 includes a detailed description of the Database Audit Process.

The Coder Manual standardizes the way coders enter documents data.

Coding Manual Table of Contents

I. INTRODUCTION TO THE CODING MANUAL

1. Logging on to the DEXS System
2. SOURCE CODE/PREFIX/DOCUMENT NUMBER & UNIT RANGE
3. DOCUMENT DATE
 - Mechanics of Coding a Date
 - The Use of Zeros in a Full Date
 - The Date Flag: One Set of Digits for All Irregular Dates
 - Rules for Selecting a Date
 - Choose the Most Recent Revision Date
 - Select the Latest Signature Date
 - Code the Creation Date Stated in the Document Body
 - Find the Most Recent Date Referenced in the Text
 - Use the Date Flag to Code a Date Range
 - Use the Date Flag if no Date Exists
 - Select the Last Revision Date
 - Use the Date Flag for Quarterly or Seasonal Dates
 - Capture Important Dates that are not Document Dates in the Title
4. DOCUMENT TYPE
5. DOCUMENT TITLE

6. DOCUMENT CHARACTERISTICS

7. DOCUMENT SUBJECTS

8. NAMES

9. THE COMMENTS FIELD

10. ENDING A CODING SESSION

11. QC REVIEWS AND EDITS

Additional copies of the Coding Manual may be ordered using the On-Line Order form, and mailing it to:

CompHaven
P.O. Box 50285
Bellevue, WA 98015-0285

Or, On-Line on the Internet

Visit our web site at <http://www.krng.com> then click on the Software Solutions link.



Labels Generator Software

Labels Generator Software and Documentation



CompHaven's Labels Generator software produces the labels you need to organize your documents. Labels Generator comes complete with On-Line Help to guide you through every step of the Labels Generation process. Labels Generator is included in the DEXS Project Managers Suite.

Labels Generator produces the following labels

- Sequential Document Number Labels
- Batch Labels
- Box Labels
- Exhibit Labels
- Address Labels
- Notebook Labels
- Floppy Disk Labels (5.25 and 3.5 inch disks)
- File Folder Labels
- Name Tag Labels
- Index Tab Divider Labels

You can order Labels Generator using the DEXS Registration system in the Comphaven group at your Program Manager screen.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



DEXS ASCII Copy Program



DEXS ASCII
Copy

The DEXS ASCII Copy Program is designed to allow you to copy a database, or a selected subset of a database to a separate file in an ASCII format. This can be useful if you are working on a case with multiple law firms, some of whom use a different database systems. You can transfer data from your system to theirs using the ASCII Copy Utility.

The DEXS ASCII Copy Utility is included in the Project Managers Suite. This export program is also available for purchase to registered users of the DEXS Workstation software.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



DISCLAIMER OF WARRANTY

THIS SOFTWARE AND THE ACCOMPANYING MANUALS ARE SOLD "AS IS" AND WITHOUT WARRANTIES AS TO PERFORMANCE OF MERCHANTABILITY OR ANY OTHER WARRANTIES WHETHER EXPRESSED OR IMPLIED. BECAUSE OF THE VARIOUS HARDWARE AND SOFTWARE ENVIRONMENTS INTO WHICH THIS PROGRAM MAY BE PUT, NO WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE IS OFFERED. GOOD DATA PROCESSING PROCEDURES DICTATES THAT ANY PROGRAM BE THOROUGHLY TESTED WITH NON-CRITICAL DATA BEFORE RELYING ON IT. THE USER MUST ASSUME THE ENTIRE RISK OF USING THE PROGRAM, ANY LIABILITY OF THE SELLER WILL BE LIMITED EXCLUSIVELY TO PRODUCT REPLACEMENT OR REFUND OF PURCHASE PRICE.



Exercises to Learn DEXS

Each of the following exercises relates to a specific aspect of using DEXS. You should review the DEXS QuickView program (available from the DEXS group panel in Windows) before working on the practice exercises. Each session will take 5 - 15 minutes to complete. Each exercise builds on the previous one; these Exercises will make more sense if you complete them in the order presented here. Remember: Press F1 for Help!

You can print this entire set of practice exercises by clicking on the File option at the top of this screen, then clicking on Print Topic.

The practice exercises are designed to accomplish the following tasks:


- Find the Sample Document - Find the sample document printed from the DEXS QuickView
- Modify the Sample Document -Add your name to the sample document found in the above exercise.
- Update a Table - Update the Coder Initials Table to include your initials
- Find Your Name-Using the Search/Report function, find your name in the sample database
- Print a Report- Print Operations Reports from the sample database in chronological Order
- Variations to Printing Reports - Print Exhibits reports in Ex.number order; and limited field reports.
- Practice coding Documents- Practice coding the five sample documents enclosed in the printed Orientation Guide.
- Create a New Database- Create a new database to use in the next exercise.
- Exporting Records to the New Database- Select Deposition Exhibits and export only these records to the New database.

To print this practice section, Click on File (Top of screen), then Click on Print Topic

Find the Sample Document

The last screen of the QuickView provides a Print a Sample Document button. Click on this button and QuickView will print a sample document for you to find using DEXS. This document is coded in the Raptor v. Gemstone sample database which is shipped with DEXS. The document print also shows all the data coded from the document and tips to finding it using the DEXS Search and Reports Function. This search provides a good first pass at finding documents in the sample database. Go to the last screen of the QuickView and print the sample document, then follow the instructions on the bottom half of the page.

Modify the Sample Document

Modify the Sample Document: Using the DEXS Update function, go into the Raptor Database  and change the sample document. Highlight the Raptor Database, then Click on the Update button. Click on the Down Arrow button next to Coder Initials box to display the list of current coders. the list will probably only include the initials "SAM", the Sample Coder. Click on the initials SAM, then on the OK button. The first record of the Raptor database will be displayed.

Click on the Beginning Document Number field, then on the Edit option at the top of the screen. This will bring up the Find function. Review the Find function options, then enter the document number of "2541" in the "Find What:" box. Next, click on the "Where:" field and change it from "Match Whole Field" to "Any Part of Field", then click on the "Find First" button. Once you have located the document, go to the names screen (click on the Names button on the bottom row of buttons, then add your name as a "To" connection to the document. Press the F1 key for specific rules for entering names, e.g. Lastname,Firstname /FirmName. Return to the main document entry screen by exiting the Names screen once you have added your name to the document record.

Update a Table

Update a Table: You will need to update tables to set up your databases in DEXS. In this exercise you will Update the Coder Initials table before you exit the Data Entry function. Your should be at the data entry screen after you exited the names screen from the above exercise. Click on the Update Tables option listed at the top of the screen. Click on the Coder Initials item in the list of available tables to update. The Update Coder Initials form will appear. Enter your initials, press the tab key, then enter your name. Click on the Close button to return to the data entry screen. Click on the Exit button to return to the database selector screen.

Find Your Name

Find Your Name: Next you will go into the Raptor Database and find your name. Highlight the Raptor Database, then click on the Search/Report button. Click on the "Names" tab when the search screen appears. You need to click on the "Update Names" button since you have added names to the database. Click on the button with the letter corresponding to the first letter of your last name. Locate your name on the list, then click on the black box directly to the left of your name. The box will turn red. Click on the tab "Title Viewer", then click on the View Details button. Scroll down (scroll bar to the right) on the Details Screen to locate your name. Click on the Print button to print the database record. Press the Exit button to return to the Search screen.

Print A Report

Print a Report: In this exercise you will select all the Operations Reports and print the full records in chronological order. To start out, click on the Type tab. Next, click on the black box corresponding to the document type Operations Reports (at the bottom of the list). Next go to the Title Viewer and click on the Select All Titles button; all of the titles will be highlighted. Next click on the Generate Reports tab. Click on the "Enter Report Description" and enter "Test data base print of Operations reports in Chron Order".

Next locate the Sort Order box in the lower left hand corner of the screen. Click on the circle corresponding to "Date", changing the sort order of the report from numerical to chronological. Click on the Print button to print the report.

Variations To Printing

Printing a Limited number of fields: Using the same screen, click on the Characteristics, Names, Subjects, and Comments boxes in the "Include" box directly above the "Sort" box.

The "X" in each box will disappear, indicating that these fields will not be printed on this report. Click on the Report Title box and update the existing report title to note that these fields were not included on this printout. Click on the Print button to print the report. NOTE: Each of these reports printed as the final page a list of the selection criteria used to define the report. See if you can print another report without this Criteria page.

Printing Exhibits in Exhibit Number Order: The purpose of this exercise is to select all the Lumbax deposition exhibits and print the list in exhibit number order. At the Search Screen click on the "Clear Criteria" button to clear out all of the existing search criteria. Next, click on the Characteristics tab. Click on the "+" sign to the left of Deposition Exhibits". The individual deposition exhibit numbers will be listed in ascending order. Scroll down to the beginning of the Lumbax exhibits; Lumbax 12. Click on the black box to the left of each Lumbax exhibit, Lumbax 12 - 41. Next click on the Title Viewer tab ;and click on the Select All Titles button. At this point you have identified all the Lumbax exhibits and selected each record to be printed.

Click on the Generate Reports to create your report. Locate the item "Characteristic" in the Sort Order box in the lower left hand corner. Click on the circle next to Characteristics. Click on the Report Description panel and enter a description indicating that the report consists of all the Lumbax Deposition Exhibits sorted in Exhibit number order. Click on the Print button to print your report. Once your report is printed note that the records are sorted in ascending order corresponding to the Lumbax Exhibit numbers. Also note that there are two documents labeled as Lumbax 12; counsel used the same exhibit number on two different documents in the Lumbax deposition.

Practice Coding Documents

Practice Coding documents: The best way to learn how to use the DEXS data entry system is to use it. Directly following this Introduction are five documents and their corresponding database printouts. These samples are taken from the expanded Sample Database which is included in the DEXS Project Manager's Kit.

First, go to the Raptor database, data entry function and, using the DEXS Update function, go into the Raptor Database. Click on the "Save" button to bring up a clear coding screen. Code each document, using the F1 key to get On-line Coding Instructions any time you need it. Try coding each document without referring to the corresponding document printouts until after you are done coding.

Create a New Database

Create a New database: Click on the Database Options option at the top left of the opening screen. Next, click on the Add a Database option. Name the new database with your initials and the word "test", followed by the .mdb suffix, e.g. JFKTEST.MDB. Give your database a descriptive name in the next screen, e.g. My Test Database - JFK. Click on OK and you are done.

Export Records to a New Database

Export records to a new database: The purpose of this exercise is to select all the documents noted as deposition exhibits and Export (copy) these records into your database. First, Highlight the Raptor database, then click on the Search/Update button. Next, Click on the Characteristics tab. Click on the black box corresponding to the Deposition Exhibits characteristic; the box will turn red.

Next, click on the Title Viewer tab, then click on the Select All Titles button. The next step is to click on the Generate Reports tab and export the selected records to the new database.

At the Generate Reports tab click on the Export button (lower center of the screen). The CompHaven Database Export Utility will appear next. Click on the Export button to view a list of the available databases to which you can export the selected records. Click on the database you created (e.g. your initials test.mdb) then click on the OK button. This procedure copies the selected records from the Raptor Database into your database. Once the export procedure is complete, exit back to the Main Screen and update the Database description panel to indicate that this is an exhibits database.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



DEXS Hardware Software Requirements

HARDWARE...

DEXS is available in Single User and Network versions. Single users need, as a minimum an IBM compatible 80386 operating at 40Mhz with a minimum of 6MB of RAM memory and 12 Mb of free hard disk space. We recommend a 80486 PC with 8MB or more RAM. You also need MS-Dos 3.2 or better, Microsoft Windows 3.0 or better, and a mouse. The actual disk space you will need depends on the size of your databases.

SOFTWARE...

DEXS database software is distributed in a Shareware format. Users are asked to register their copy of the software if they have DEXS installed on their computer for over 30 days. Click below on Registering DEXS for more information.

[Registering DEXS](#)

For More Information:

E-Mail us on the Internet at:

apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



Registering DEXS



Register DEXS

Use the DEXS Registration Program In the DEXS Group of your Windows Program Manager to access the DEXS Registration Program.

If you have not registered your copy of DEXS Document & Exhibit System, you can do so by mailing the registration found in the DEXS Registration program on-line. You will then be eligible for product support, and all the other advantages of DEXS, depending on which Edition you chose. Mail your completed Registration form, along with payment, to:

CompHaven
P.O. Box 50285
Bellevue. WA 98015-0285

**You can also register on our web site on the Internet <http://www.krng.com/apps>
visit our site to register by phone, fax, e-mail or over the Internet!**

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

Click below for more information about the editions of DEXS:

[Comparing DEXS Editions](#)



Product Services

Product Support

Product Support is available from CompHaven Information Systems for registered users. E-Mail (Internet) Support is available by sending E-mail to apps@krng.com

When you contact Product Support, please provide the following information:

- your computer's make and model,
- your phone number and best time to contact you (long distance calls are returned on a collect call basis).
- your version of Windows, and your Edition of DEXS,
- Be able to supply the serial number for your registered copy of DEXS.

See Also:

[Registering DEXS](#)

[Product Enhancement](#)



Product Enhancement Card

The Product Enhancement Card



A complete On-Line Product Enhancement Form is available for your use. We encourage you to tell us what we can do to improve DEXS!. In the CompHaven Group, Click on the "Register DEXS" or icon in the Shareware Edition or the "Product Services" icon in the Coder Edition or the Project Managers Edition. Next, click on the "Product Enhancement" button to retrieve a complete on-line Suggest Box! Follow the instructions to enter your suggestions and print out your suggestion form.

We need your suggestions to help us continue to improve DEXS and meet your needs.

Please mail your Product Enhancement Suggestions:

CompHaven Information Systems, Inc.

For More Information:

E-Mail us on the Internet at:

apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



Shortcuts & Tips

Zoom in on a Field

To zoom in on a field, press the SHIFT and the F2 key. To exit zoom mode, click on the OK button.

Exporting Data

The Export function involves a sophisticated multi-tasking process which may take some time, depending on the amount of records. We suggest that if you are exporting a large amount of data, do it over your lunch break or overnight. Remember to update the Document Number Validation table in the new database with the Update Tables function.

Finding a Record

In the Data Entry screen, click in the beginning document number field with the RIGHT mouse button. Select "Find" from the list that appears. Enter the beginning document number you wish to find. Click on the Find First button. Close the Find function by clicking on the Close button. For more information, review the Edit\Find help topic.

Enhancing DEXS Performance

DEXS is a memory intensive program. For maximum performance, close all other programs while running DEXS.

Finding a Name

In the name entry screen, enter the first two characters of the name you wish to find. Click on the down arrow, or press the ALT+{down arrow} keys to open the names drop box in the vicinity of the name you wish to find.

Accessing Help

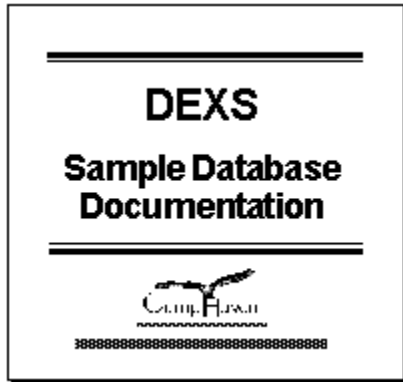
In any screen, press the F1 button for Help.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!



Sample Documents Database



DEXS Project Manager's Kit comes with a complete sample case and database to demonstrate its features and to use in the coder training program. A hard copy of each of the documents for the fictitious case of Raptor v. Gemstone is included in the documentation; you can review the hard copy of the documents and then look on-screen to see how they were coded.

Each of the documents on the sample case was carefully created to generate a wide variety of coding questions to use in coder training. The sample case includes an overview of the sample documents, a case summary memo describing the "status" of the case, a case chronology, and 138 documents "produced" from four sources.

All the documents are coded on the sample database and provided in hard copy. The DEXS Administrators Guide includes a complete documents coder training program which uses these sample documents.

The Sample Database Documentation includes:

- Introduction to sample case and the coder training process
- Lists for Sample Case- Case Initials, Abbreviations and Acronyms
- Raptor v. Gemstone Case/Documents Chronology
- Case Summary
- Hardcopies of 138 completely fictitious documents, "produced" from four sources
- The Raptor v. Gemstone Database, pre-installed with DEXS.



The Expanded Sample Database Documentation is included in the Project Managers Suite.

For More Information:
E-Mail us on the Internet at:
apps@krng.com

Or, visit our Internet site <http://www.krng.com/apps> for the latest information about DEXS!

characteristics

Characteristics are physical attributes of a document. For example, marginalia would be a document characteristic.

connection code

A connection code reflects the role of a person within a document. For example, the author is connected to the document as a "From", and the Recipient is connected as a "To". Other connection codes are: "Mention", "CC", and "Attendee".

Document Number Validation

Document Number Validation is an automated QC function. This table allows the administrative staff to assign a number range to a source code. If a coder accidentally attempts to code a document number that falls outside that range, DEXS will not accept it.

Import

An Import posting type is attached to all records that were brought into the DEXS system using the Import function. If an import is edited, its posting type is changed to an update type.

inclusion/exclusion

The process of including or excluding a document based on its content coinciding with your search criteria. Click on the Selector Box to the left of the item to select or deselect it. A selected item will have a red box, a deselected item will have a black box.

New Entry

A New Entry is a document that has been opened a single time. It has not been edited in any way.

program control box

The program control box is the box containing the minus sign in the upper left hand corner of the screen.

Record Scroll Bar

A tool that allows the user to move between records. It is located in the lower left corner of the database update screen.

records

A coded document in the database.

search criteria

A combination of search parameters that produces all documents that conform to those parameters.

search parameters

A specific document characteristic used to locate it. For example, a specific date or name.

source code

A source code is an alphanumeric value that precedes the document number. Often, the source code serves as an indicator of the producing party. (e.g. EPA 0000001)

subjects

Subjects are specific pre-defined topics in a document.

Update

The Update posting type is a record that has been coded and revised. For example, a record that has been coded, QC'd, and had the edits entered, would have an Update posting type.

