



NEW SITE ADMINISTRATION GUIDE

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HOW TO ADD A NEW SITE

Topic Overview:

Several steps are required to license and implement a new site within KI Systems Office Automation Tools for Microsoft Word 2000. Completion of each step listed below is required to ensure successful site creation.

- ❑ Contact KI Systems to order a New Site License
- ❑ Use the following Guide to Create a New Site
- ❑ Assign employee(s) to the New Site
- ❑ Create New Site Logo Graphics



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Contact KI Systems to order a New Site License

Before you begin the process of adding a new site, please contact KI Systems to order your new site license. To remain compliant with your License and Consulting Services Agreement, each additional site and desktops must be licensed. To order your new site licenses please contact:

Kristi LeaMaster
President
KI Systems, Inc.
9310 – 176th ST SE
Snohomish, WA 98296

Telephone: 425-402-0791
Fax: 360-668-9864
email: kristil@kisys.com

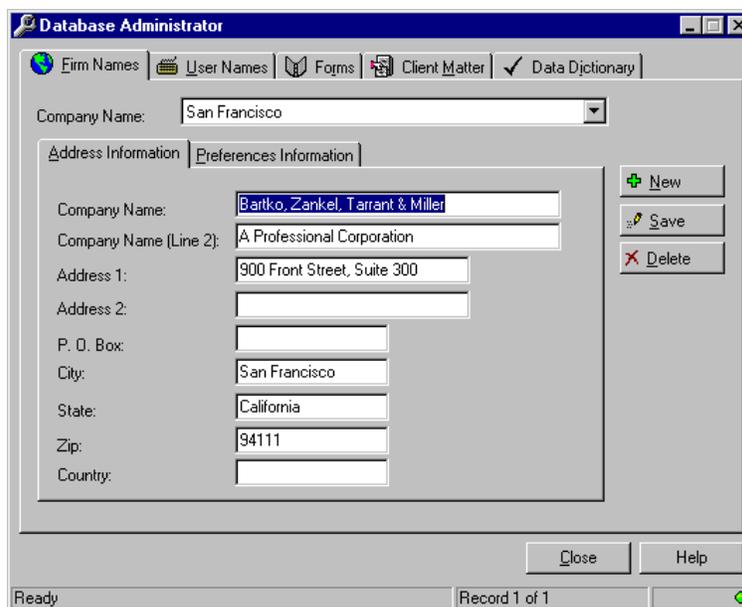
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How to create a New Site:

From a workstation configured with KI Systems Software, do the following:

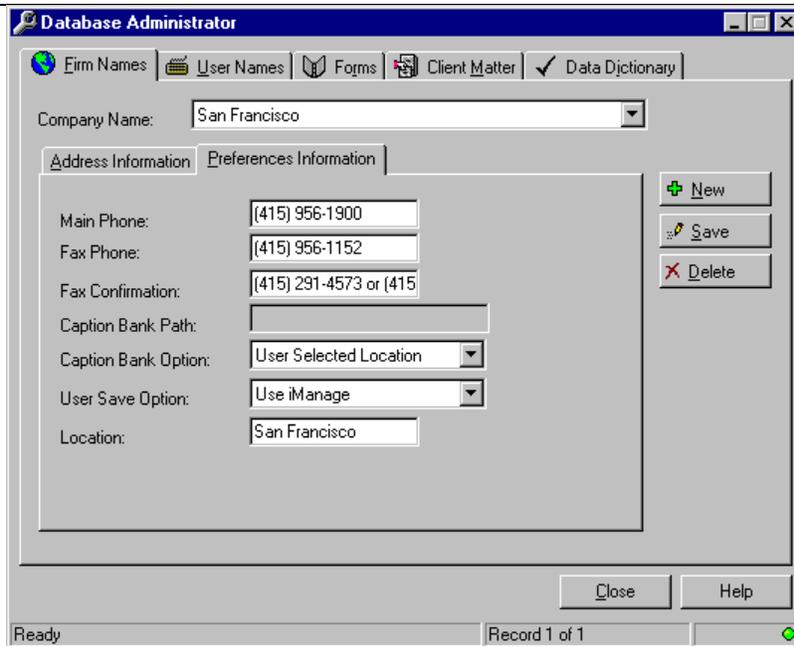
- ❑ From the Start menu, select Run
- ❑ Type: KIADMIN and select OK

The Firm Names tab is visible and the following screen appears:



- ❑ From the Firm Names Tab, Click New
- ❑ Complete the Address Information data as appropriate for your firm
- ❑ Continue on to the Preferences Information tab.

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- ❑ Enter the Main Phone number of the current office.
- ❑ Enter the Fax Phone number.
- ❑ If you are using the Pleading Pak templates, enter the path where Caption Bank entries will be stored.

There are two Caption Bank Options:

User Selected Location option allows you to direct caption bank entries to any location you want.

Use Central Caption Bank option forces all caption bank entries to a location on the network for all users to share.

- ❑ Select the one best for your work environment.

There are three User Save Options:

Do not use Document Numbering will allow you to save documents use Word's default saving feature.

Use (Document Management System Name) is chosen if your firm has such a system.

Use Document Numbering allows you to save using KI System's File Save feature.

- ❑ Select the one best for your work environment.
- ❑ In the Location field, enter the name of the office or branch associated with the information provided on the Address Information and Preferences Information



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- tabs. This can be the City, a company acronym, or other name designating the firm. **Note:** This field may not be left blank.
- Press Save on the Firm Names tab to complete this task.



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How to assign employees to the New Site:

For the templates and macros to function correctly, a user must be associated with a single site. This association allows Company and Logo graphics to be access correctly within the system. To associate an employee with the New Site, do the following:

- ❑ From KIADMIN, select the User Names tab
- ❑ Select the Address Book button
- ❑ From the Address Book (Employee) dialog, search for the desired employee or create a new employee from the Address tab. Once the desired employee record has been selected, Click OK to return to KIAdmin, User Names tab.
- ❑ The User Names tab will display preference settings for the employee selected, from the Office drop down list select the New Site name
- ❑ Press Save on the User Names tab to complete this task.



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How to set Logo graphics for the New Site:

Along with this document, you were provided a ZIP file that includes several administrative logo documents that have been tailored for your New Site. The following Logo Document were included in the Zip File:

- Letter Logo
- Personal Letterhead Logo
- Memo Logo
- Fax Logo
- Envelope Logo
- Label Logo
- Personal Envelope Logo
- Pleading Logo

Logo Builder documents are Administrative Tools only and should not be distributed to user Workstations. Only administrators or those individuals assigned the task of maintaining office logo information should have access to these files.

To set the Logo graphics for the New Site, do the following:

Warning: *When information in the Logo Builder documents are modified and saved – this will globally take affect on all users’ workstations. Please ensure that any modifications you make are correct before saving changes in the Logo Builder documents.*

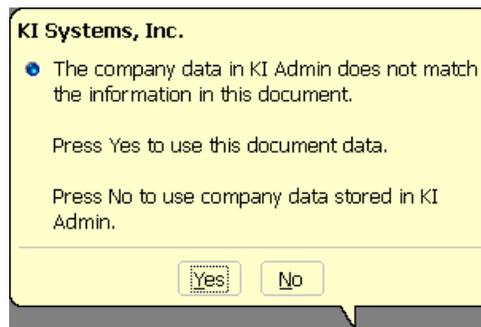
- ❑ On a Workstation configured with KI Systems Office Automation Tools, extract the logo documents into a working folder of your choice.
- ❑ Open MS Word 2000 and set macro security settings to Low. This is done because the logo documents contain macros which must be allowed to run for this process to continue.
- ❑ From File Open, open a single Logo Builder document from your working folder.
- ❑ The Logo Builder process will prompt you to select the Office Location. Select the New Site name.

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Note: The Office Location list may have one or many sites, depending on your firm.

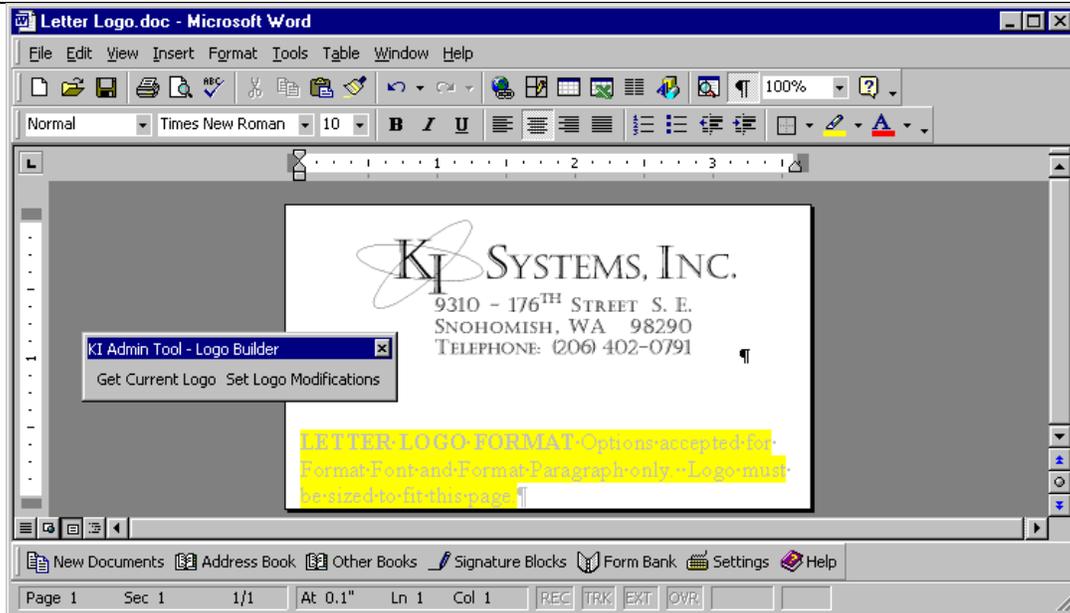
- ❑ The Logo Builder document opens with the current Logo Layout for the template type (i.e. Letter).
- ❑ If changes have been made to the Company Information contained in the KI Admin Tool – OR – if your logo contains additional text not stored in Company Information (i.e. “Telephone: ” or “Facsimile: ”before office phone numbers) – OR – if your logo contains graphic file(s). You will see the following prompt:



- ❑ Click “YES” to use this document data.
- ❑ If available, Click Word’s Undo button, until Undo is unavailable. Your New Site Logo will appear.
- ❑ Warning: Your Logo Builder documents have been sized to match the available space in the corresponding Business Pak template(s). Do not change the page setup/size of the Logo Builder document. Do not allow your changes to extend to more than one page.
- ❑ On the KI Admin Tool Logo Builder Toolbar - Click “Set Logo Modifications”



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- To verify changes have been saved to the database, press Ctrl+A to select all text in the Logo Builder document and press Delete.
- Click on the "Get Current Logo" button and the stylized logo information will reappear in the Logo Builder document.
- Verify that all information is correct then save the final changes to the Logo Builder document.
- Close the Logo Builder document.
- Repeat the above steps for each Logo document included in your Zip file.

When each Logo Document has been set, the database will contain the Logo Graphics for your New Site. You should then re-set your Macro Security Settings to their prior level. The Templates and Macros will now function for users assigned to the New Site and the new Graphical Logos will be in use.