

# **Applied Systems Client Network**

**SEMINAR HANDOUT**

## ***Managing and Organizing Attachments in TAM***

**ASCnet<sup>TM</sup>**



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## Prepared for ASCnet

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**Objective:** Help agencies identify the best layout for attachment categories, subcategories and description when working within The Agency Management system.

**Assumptions:** This seminar is based on the following  
TAM Version 10.0

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## ***STORING information in TAM...it's really about RETRIEVING information***

More and more agencies have embraced electronic storage of information and have begun scanning and attaching documents to clients in TAM.

TAM provides an amazing amount of customization, most of which the average agency doesn't take full advantage.

While clearly identifying attachment categories and subcategories may not seem like an important part of the journey to a paperless environment, many will argue it's the MOST important step, because of the age old adage – Garbage In, Garbage Out.

*Playing Devil's Advocate – Why is it garbage if it is a readable, electronically stored document? Isn't that the end goal getting rid of the paper??? Calling it garbage is harsh!*

Well imagine this situation; 20 years ago your agency buys a brand new file cabinet. You have several meetings deciding all the “important” details... WHERE the file cabinet will go, WHO will do the filing, WHAT will go in the file cabinet... but you never came up with a solid standard for HOW the papers get filed. So some people file by the client's last name, others file by the date the work was processed, another files according to the issuing company and one CSR files based on the color of the paper! At first it's not THAT difficult to find stuff, but after your agency has been using that file cabinet for a while, it becomes more and more difficult to find the papers you need. The same thing will happen to your electronic file cabinet if you do not IDENTIFY, DOCUMENT and AUDIT your attachment categories and sub-categories.

It's not too late to create a standard if you have already started scanning. We will address that issue toward the end of class!

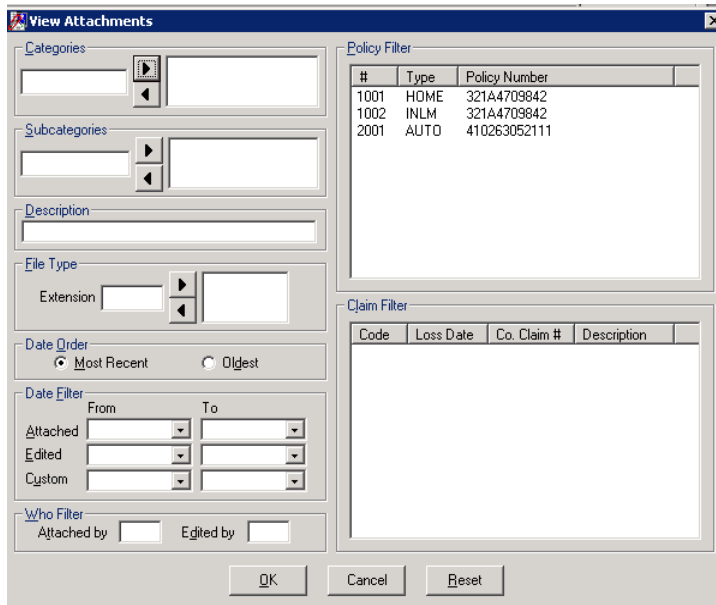
### ***Where To Begin... The End***

So you have decided that you need to have an agency specific list of attachment categories and sub-categories, now what? It's all about the meetings! Get a group of people together that represent a cross-section of the agency and begin brainstorming! Start at the end, think about HOW you would want to find a document, assuming that a client may have over 1,000 attachments after a while of electronic storage. Have lots of GIANT post-it notes or white board space and just have people start talking. You may have to get them started or lay down some ground rules... my favorite ground rule is no “mode of transportation” categories. “Mode of transportation” categories identify HOW you sent or received the information you are filing. For example – Fax – E-mail – Snail Mail. This is a difficult concept to introduce to some because you say – what type of documents do you file – they say faxes! While it IS true they are filing a fax, the reality of the situation is in a few short months, when they are looking for that CHANGE REQUEST that they received from a client, they probably won't remember that it arrived

via fax. So when looking at a client’s attachments in TAM, if 450 of the 1,000 attachments are “FAX”, 500 attachments are “E-MAIL” and 50 are “DOCUMENTS”, it will be very difficult to use a filter to find a Change Request!

### ***Did you say Filter?!?***

TAM filters are the key finding information quickly. Filters allow you see only the attachments that meet the criteria of the filter that you have defined. Below is the filter screen for attachments.



There are several options that you can use to reduce your attachment list when you are looking for something specific... assuming everyone is using all the fields the same way, every time they attach a document.

A couple of notes about the filter options...

It is difficult to match on a Description since it is a free form field.

You cannot filter on a policy if the policy that attachment was associated with has been deleted from the system.

It is important to make sure that the group that is defining the attachment categories and subcategories have a solid understanding of how the filter screen works.

Understanding the power of the filter will enable them to make informed decisions when creating the category lists.

## Process Recap

So far we have acknowledged the importance of the defined category fields, assembled a group that represents your agency, we have brainstormed – listing what types of documents we will be storing, and we have learned the attachment filter screen. The next step is digesting the brainstorming list.

## Back to Brainstorming

The next step is return to the brainstorming list your group created. Here’s where things get challenging. You need to decide how to categorize all the things on your brainstorming list. (And also decide which items are unnecessary now that you are more familiar with filters.)

One of the most important ideas to keep in the front of everyone’s mind is – how will we want to filter our list when we are looking for things. Will we want to be able to see all the documents required to reshop the account in one list... if so you need a Marketing category, then assign the items on your list that would be subcategories under Marketing.

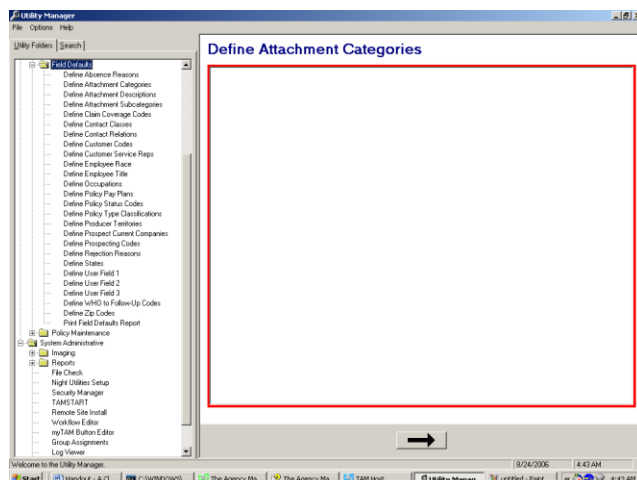
Don’t forget all the groups that will be imaging – including benefits, accounting and human resources!

## That’s a Big List

It is not unusual for even the smallest agency to have 10-20 categories and 30-50 subcategories. These numbers may seem overwhelming to you, but remember, different departments use different fields. Each person in the agency may only use 5 categories and 10 subcategories.

## Adding Attachment Categories and Subcategories

Now that you have a list with all your categories and subcategories, the TAM Administrator needs to add the lists to the management system.



From Utility Manager, select Field Defaults, Define Attachment Categories or Attachment Subcategories.

## Attachment Security

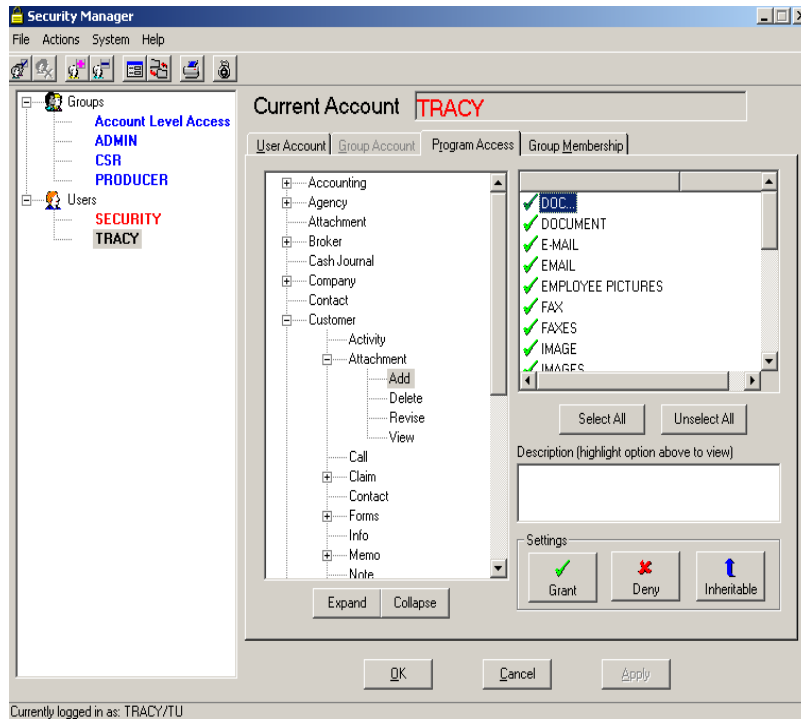
You can apply security to restrictions to attachment categories, but not subcategories.

There are four rights that can be granted to each attachment category – Add, Delete, Revise and View. Add allows a user to add an attachment of that category type. Delete allows a user to remove an attachment of that category type from the system permanently. Revise allows a user to change an attachment of that category type – if the attachment is revisable – like a word document. And view allows a user to open an attachment of that category type.

Different groups can have different accessibility to categories. The accounting group may be the only people who can View and Add the accounting attachments, however managers may have the View right for the same attachments.

There is also the “all” option. You can give a group – like administrators the View All, Add All, Revise All and/or Delete All rights. This gives that user the right to view, add, revise and/or delete attachments regardless of their attachment category.

You cannot apply security settings until the attachment categories have been added to the system.



Also, consider if you will allow access to the **Insert in Validation Window** that allows Categories, Subcategories and Descriptions to be added to the lookup window when attaching.

### ***Implementation Time***

Once the attachment categories and subcategories have been defined, added to the system and secured, it's time to introduce your new standards to the masses. Instead of reviewing all the options to the entire staff, focus your efforts to similar groups. Show your CSR's the categories that pertain to them. Prove them with a "cheat sheet" with their lists – excluding items that they won't use in their daily life.

Keeping the introduction and training focus to work groups will allow people to see the simplicity of the system and embrace it. The other option is to display all the lists on the overhead and have people already writing off the process because it's "too hard" or "too confusing".

Don't forget to train the people who will be retrieving information from the system – your producers. Making them comfortable with filters will help them to efficiently pull information up on their screens.

### ***What About Attachment Descriptions***

Attachment descriptions are a free form field, which means the users can type in the description for their attachment, you don't have to create canned descriptions.

Attachment descriptions are very important when you are attempting to efficiently retrieve information. Attachment descriptions are a single line of information about that attachment.

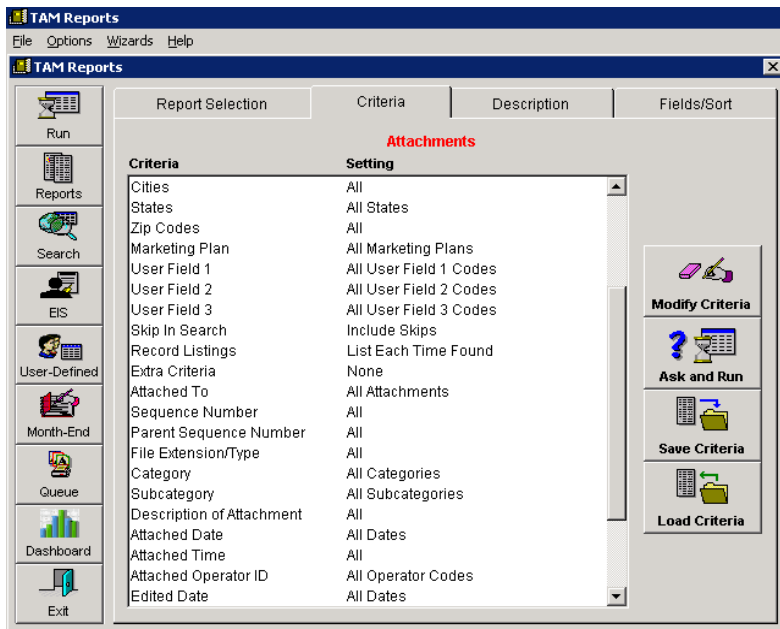
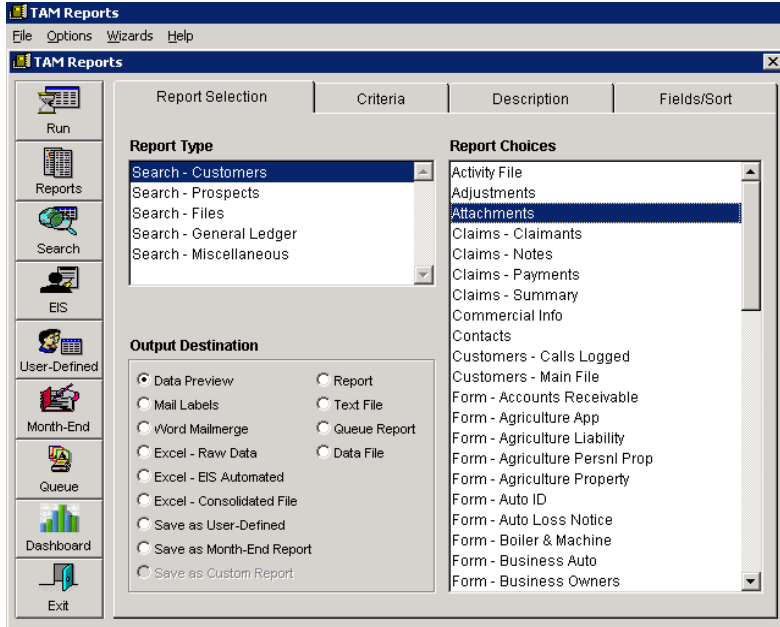
You can create commonly used entries as a time saver for your users, like 2008/2009 policy term.

Once you have created categories and subcategories, you can provide advice to users to make the more efficient. For example, if your category is Marketing and your subcategory is Driver List, there is no need to type "Driver List" in the description, because it is already defined as such in the subcategory field. This will be a hard habit to break for many.

## Auditing...It Will Make or Break You

So far you have brainstormed, added, and trained, but there's one more thing left to do and that's audit!

Auditing ensures that your staff is using the fields as they have been trained. Running a search on your attachment database regularly will provide you with a picture of what's going on with your staff.



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***“Old” Categories – Should You Delete Them?***

There will most likely be some previously defined categories that you will not want to use in your new environment. The million dollar question is, do you delete those category types or leave them in the system? There is no right answer. If you delete an attachment category you lose the ability to search, filter and secure it. For example, if you delete DOCS, in order for a user to be able to view an existing document that is coded as DOCS, they must have the VIEW ALL right in security manager, which means they could view ALL attachment categories, including management, accounting and hipaa categories, if they exist. That may not be a good thing. You COULD change the attachment category of all the attachments for the category you want to delete, but that is currently a manual process.

Some attachment category types are system categories and cannot be deleted.