

FILELAW®

FILELAW® contains full-text citations providing direction on classification of records for storage. Using FILELAW, you can establish an appropriate retention schedule and reduce costly storage space. The powerful searching capabilities allow you to search by jurisdiction, topic or industry, type of record, code number of record, keywords or phrases, name or citation of the statute or regulation, or any combination of the above.

Toolbar

The Toolbar buttons provide a quick way to access common menu items:

For assistance using
FILELAW, or to arrange
training call:
1.800.387.5164



Figure 1



Tag Record: Tags the current record (i.e. title, paragraph, etc.). To remove a tag, click Tag Record again.



Print: Print the current record or selected text.



Go Back/Go Forward: Click a button to jump back or jump forward one step.



Show History: Display your history log, including your current queries. Return to an earlier jump or query.



Synchronize Contents: Synchronize the Table of Contents with the Document window.



Contents / Document view: Splits the screen to show both the Table of Contents and Document windows.



Document view: Displays the Document window only.



Table of Contents view: Displays the Table of Contents window only.



Hit List View: Displays a list of your hits only.



Print Document: Prints the current document.



Template 1: Retrieves the FILELAW query template.



Cancel Query: Cancels the current query.



General Query Tool: Enter search terms to search the entire infobase. Click **Find** to run the search.



Previous / Next Hit: After running a search, navigate to your next or previous hit.



Previous / Next Document with Hits: After running a search, navigate to your next or previous document with hits.

Infobase Currency

To determine how current the Infobase is, click Read the Release Notes located in the Document window after launching FILELAW.

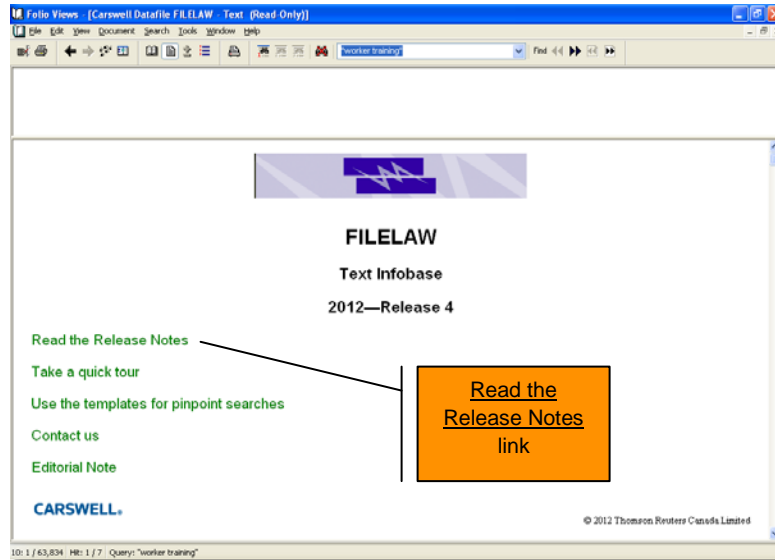


Figure 2

Note: Most citations in FILELAW may not have current year dates as a good portion of the legislation does not change from year to year, particularly as it relates to Records. The date on the record is the last date it was changed and not the last date it was reviewed.

FILELAW Documents

FILELAW documents contain: the citation, retention/limitation period, description, definition and application. The Application section lists the exceptions that may apply to managers, superintendents, professionals etc.

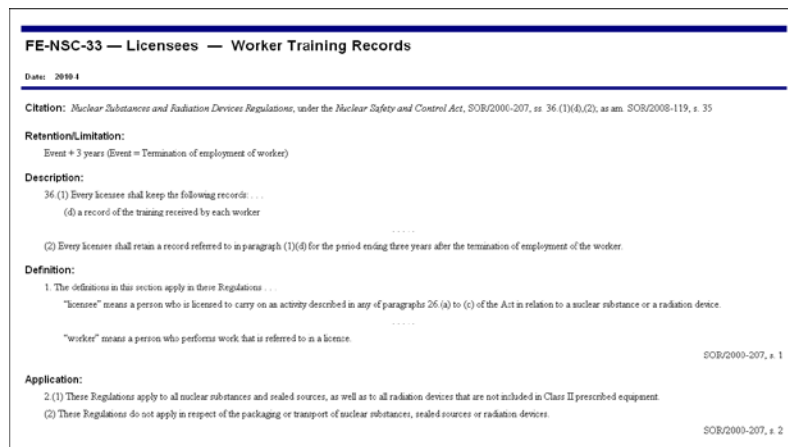


Figure 3

Browsing FILELAW Documents

1. Click the **Table of Contents** button on the Toolbar.
The Table of Contents is organized by jurisdiction, Industry type, legislation and then record series/type.
2. Click a **+** button to expand a heading. (*Conversely*, click the **-** button to collapse a heading.)

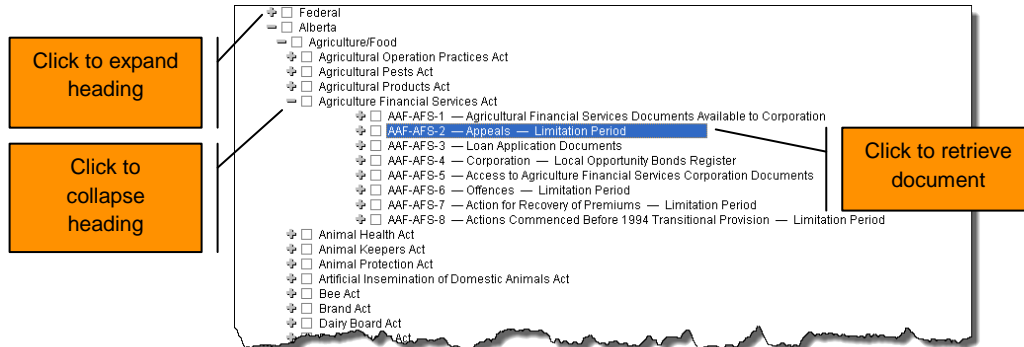


Figure 4

3. Click a document heading to retrieve the document into the Document window.

Searching FILELAW Documents

Searching the Entire Infobase

1. Enter your search terms into the *General Query Tool* located on the Toolbar.
TIP: You can use Boolean connectors for more complex searches.
2. Click **Find**.
3. The first document matching your search term(s) appears.
4. Click **Next Hit** to navigate to the next instance of your search term(s) or click **Next Document with Hits** to navigate to the next document with your search term(s).

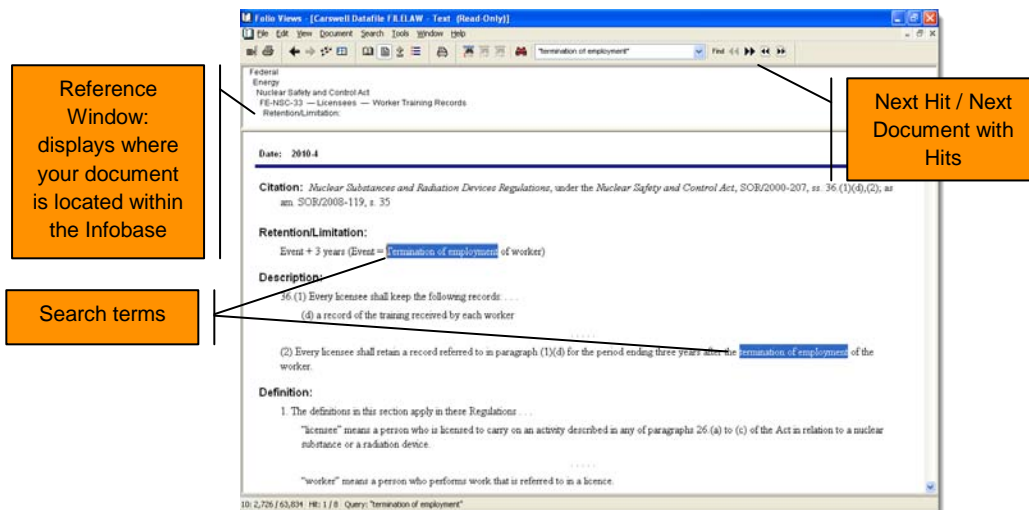


Figure 5

To clear the search from the Infobase, click the **Clear Query** button on the Toolbar.

Restricting your Search to Specific Sections of the Infobase

1. Go to the **Table of Contents**, and using the checkboxes provided, select the item(s) you wish to search.
Note: You can search at any heading level that contains a checkbox (i.e. jurisdiction, topic/industry, legislation etc.)

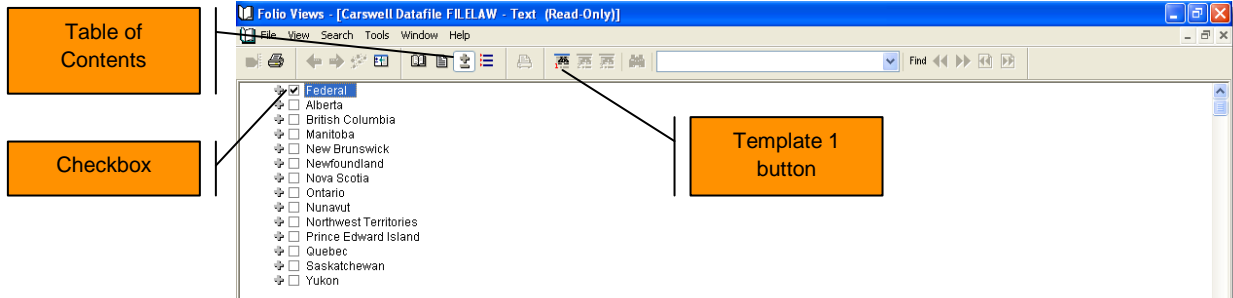


Figure 6

2. Click **Template 1** located on the Toolbar. (*Alternatively*, you can enter your terms into the General Query Tool.)
3. Enter your search term(s) into the fields provided and click **OK**.

TIPS: You may search for terms in the entry code, document title or the full text of the document, or any combination. You may also use Boolean connectors to structure your search.

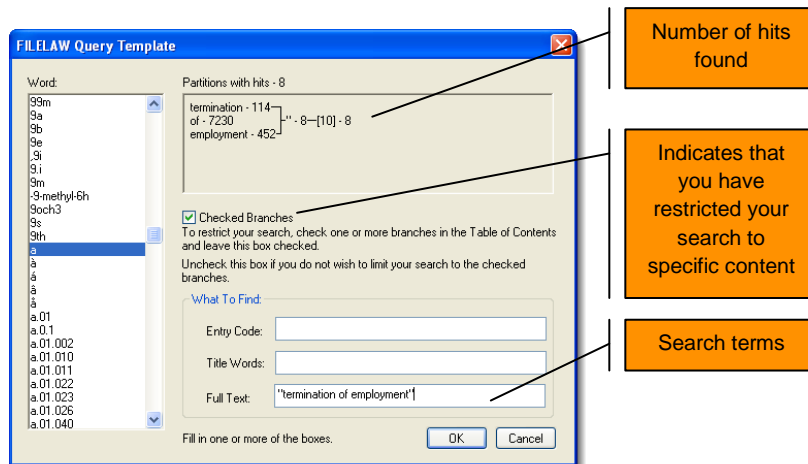


Figure 7

To clear the search from the Infobase, click the **Clear Query** button on the Toolbar.

Boolean Operators

You may use any of the following Boolean operators when structuring your searches:

Operator	Example	Result
Or	me you me or you	Finds documents with either <i>me</i> or <i>you</i> .
And	one two one & two one and two	Finds documents containing both <i>one</i> and <i>two</i> .
Not	farm not losses	Finds documents that contain the first term but not the term(s) after the NOT operator .
Phrase	"to be or not"	Finds documents with the exact phrase " <i>to be or not</i> ".
Unordered proximity	"resulting trust"@5	Finds documents containing these two terms where the terms are found within 5 words of each other, regardless of the order.
Ordered proximity	"child interests"/3	Finds documents containing these two terms within three words of each other in the order in which you entered them.
Single character wildcard	wom?n	Finds documents with <i>woman</i> , <i>women</i> .
Multiple character wildcard	rust*	Finds documents with <i>rust</i> , <i>rusted</i> , <i>rusting</i> , <i>rustproof</i> .
Common roots	run%	Finds documents with <i>run</i> , <i>ran</i> , <i>runs</i> , and <i>running</i> .
Synonym	alert\$	Finds documents with <i>alert</i> , <i>active</i> , <i>aware</i> , <i>quick</i> .

Order of Precedence

Searches that contain more than one Boolean operator are processed in the following order:

NOT, OR, AND

You may use parentheses to change the order in which the query is processed. When you place terms and connectors within parentheses, those connectors are processed first.

Navigating your Result after a Search

While in the Document Window:

Click **Next Hit** to navigate to the next instance of your search term(s) or click **Next Document with Hits** to navigate to the next document with your search term(s).

While in the Table of Contents window:

The number of documents your search has retrieved appears to the left of the heading.



Figure 8

1. Expand the heading(s) by clicking the + button(s) to find the document(s) with hits.

TIP: To view only those headings containing a hit:

1. Click the **TOOLS** menu and select **Options**.
2. On the **Contents** tab, select **Headings with Hits**.
3. Click **OK**. (This becomes your new default.)
4. Click the **VIEW** menu and select **Expand to Level...**
5. Select **10** and **OK**.

Note: To return the Table of Contents to the main headings, expand the headings to level 1.

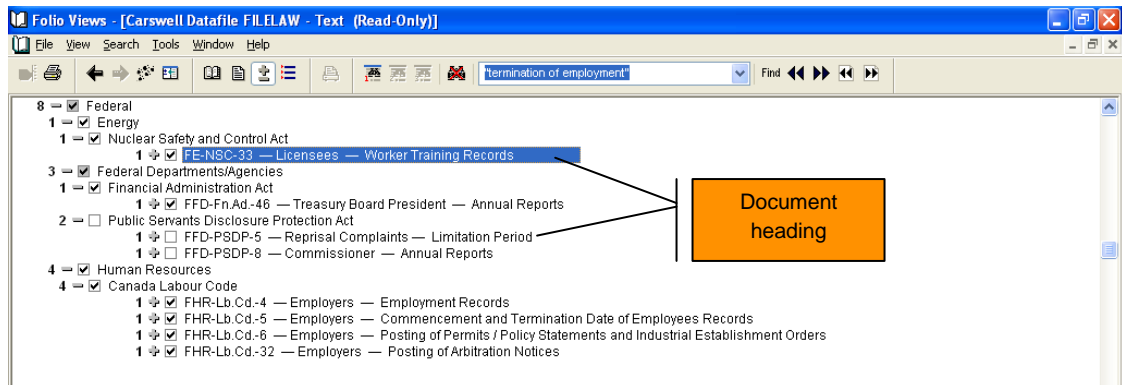


Figure 9: Shows Table of Contents with *Headings with Hits* turned on

2. Double-click a document heading to retrieve the full text and then use the navigational arrows on the Toolbar to navigate through your hits.

TIP: Click the **Contents/Document View** button to display both the Table of Contents and Document windows.

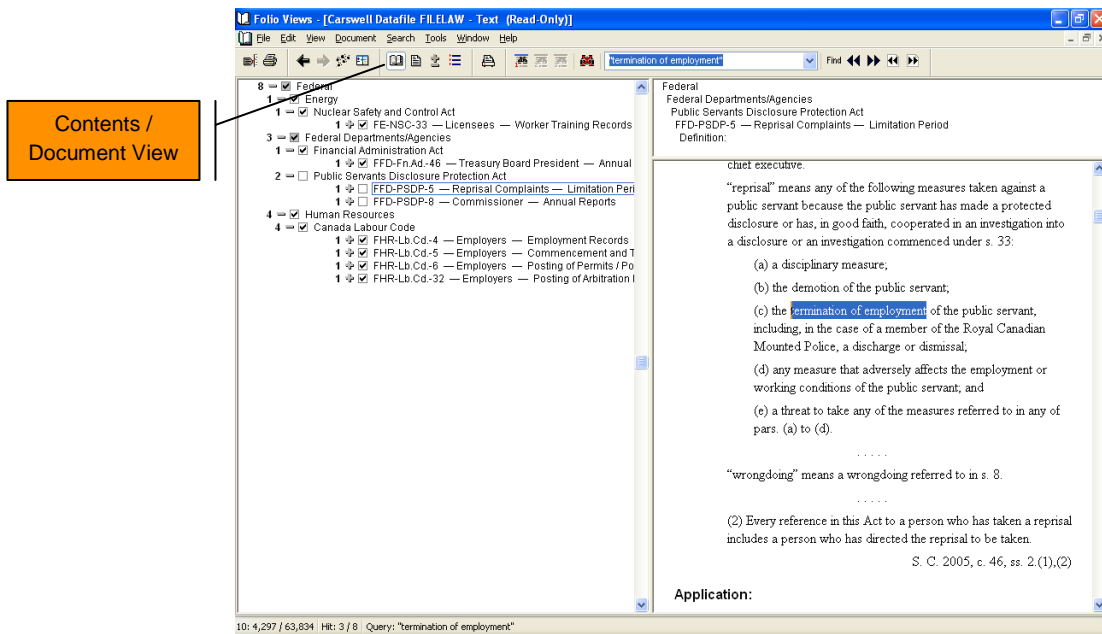


Figure 10: Contents/Document View

Printing

To print the document you are viewing:

1. Make sure your cursor is located somewhere within the document.
2. Click the **Print Document** icon located on the Toolbar.

To print selected text:

1. Highlight the text you wish to print.
2. Click the **Print** button on the Toolbar.
3. Click **OK**.

To print text in non-sequential order:

1. Highlight a selection of text and click **Tag Record** located on the Toolbar.
2. Highlight the next portion of text and click **Tag Record**. Continue to tagging your records.
3. To print all tagged records, click the **Print** button on the Toolbar.

TIP: To include the reference window information with your selected or tagged records, click the **TOOLS** menu and select **Options**. On the **Print** tab, select **Inline headings** and click **OK**. This becomes your new default.