

Texas Association of County Auditors

Guidelines for File Management System

The File Management System (FMS) is online Software as a Service model provided by DocLanding. The FMS provides a secure medium for the exchange of files and documents among members as well as a private folder for each member.

The File Management System Review committee is a sub-committee of the Technology Committee consisting of no less than three individuals from the Texas Counties with computer technology experience as appointed by the President of TACA. The President shall designate the Technology Committee Chair to oversee the TACA File Management System (FMS).

The TACA Primary Point of Contact (POC) is:

Rene Camarillo, El Paso County Auditor's Office, recamarillo@epcounty.com
(915)546-2040, extension 4105

The Alternate Points of Contact are:

Brian Stevens, Dallas County Auditor's Office, bstevens@dallascounty.org
(214)653-6425

Freeman Mendell, Galveston County Auditor's Office,
Freeman.Mendell@co.galveston.tx.us (409)-770-5325

The primary and secondary point of contacts shall serve until otherwise replaced by the TACA President and must be an assistant county auditor with the approval of their County Auditor. The TACA President shall be responsible to provide immediate notification of changes in Committee Chairs who are then required to timely notify the FMS POC of changes to committee members requiring access.

Access to the FMS shall be granted to each member of the County Auditors' ListServe to access the TACA Public files. Each member will be given a user profile--username and password. Procedures will be sent to each member on how to change their password. Roles will be established for each member to access their associated folders and files.

FMS Review Committee Responsibilities:

The Committee shall:

- Monitor file size in regards to FMS contract limits allocating public and/or TACA Committee space requirements
- Establish and organize the Public folders within each Core Folder. Core Public folders can only be added by the TACA Primary Point of Contact upon request. (For example: Core Public Folders would include Committee Files for Education, Membership, Law Study, etc.)
- Establish list of acceptable file types and upload size limit.

- Review each document submitted for content and accuracy prior to upload. Only documents relevant to official county business shall be approved for the FMS.
- Establish guidelines for global search feature for each document uploaded.
- Establish a schedule to review all posted documents annually for legislative changes or superseded information, and remove any old or unused documents.
- Maintain a complete and separate backup of each document uploaded for TACA records and will be a duty assigned to Technology Committee Chair.
- Provide a reference manual to explain the different components of each screen and how to use them.

Guidelines

- Any document or file on the FMS is subject to Open Records including the user's Private Folder.
- When referencing a document maintained on the FMS in an email, provide the DocLanding URL and the file cabinet name.
- Different versions of a document: FMS will provide enable versioning so new versions of files can be added and retained.
- Uploading files: The following file types can be uploaded:
 - Microsoft Word (.doc, .docx)
 - Microsoft Excel (.xls, .xlsx)
 - Microsoft PowerPoint (.ppt, .pptx)
 - Various types of image files (for example, .jpg, .gif, .tif, .png, bmp)
 - Adobe Portable Document Format Files (.pdf)
 - Adobe Photoshop files (.psd)

Recommend files that are going to be uploaded in DocLanding be in adobe acrobat format as this is a standard reader format.

- Multiple core public files can only be created by the TACA Primary Point of Contact
- On the DocLanding home page there is "Global search..." feature. Documents can be searched by file extension (i.e., pdf, docx) or by file name (i.e., comments, fund, accounting).
- File limit: 50 megabytes for a single file upload. As a committee chair ensure only your most pertinent and up-to-date information is uploaded. Your other information should be stored on the USB flash drive. (Note: the USB flash drive will be provided by TACA and will be passed on from committee chair to committee chair)
- File properties and authors should be cleared from documents.
- System requirements: Microsoft Windows XP or higher, Microsoft Explorer 7 or higher, or Mozilla Firefox 3 or higher, Adobe Flash Player 10 or higher. You can also use a Mac OS X with Firefox.
- The technology subcommittee, under the direction of the Technology Committee Chair, will review documents posted semi-annually. The

review will provide committee chairs with feedback on their posted documents to ensure they are applicable to TACA members.

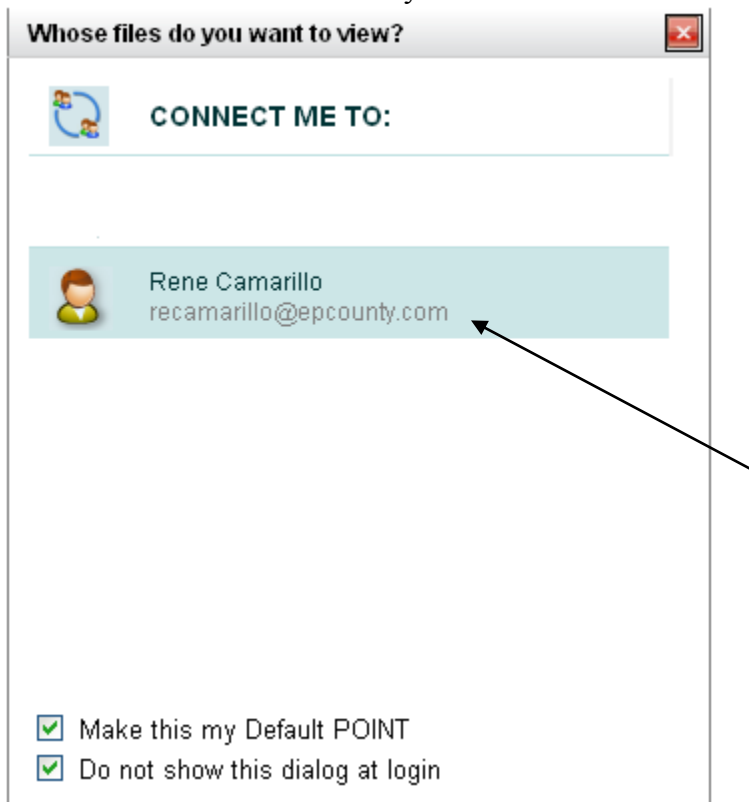
- Each committee chair is responsible for ensuring the files uploaded to DocLanding are also stored on their USB flash drive. During the semi-annual review, the subcommittee will also provide back-up capabilities.

To change your password

- On the main screen, click **Admin**. The **My Account** tab appears by default.
- Type your current password in the **Old Password** field.
- Change your password by typing in a new password, password has to be a minimum of 8 characters, into the **New Password** field, then retyping the new password into the **Verify New Password** field.
- Set your security question, at this point, so if you forget your password it may be reset.
- Click **Save Changes**.

To access the TACA File Management System

If you receive the following message during your login; you want to connect to “Rene Camarillo” as this will connect you to the TACA file management system.



You also want to check the boxes, noted above, before connecting to “Rene Camarillo”

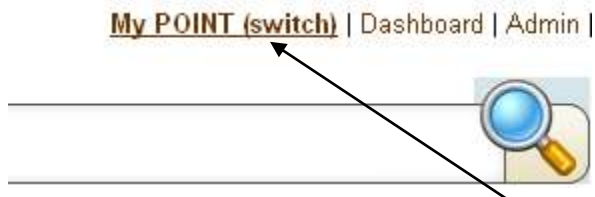
“Make this my Default POINT”

“Do now show this dialog at login”

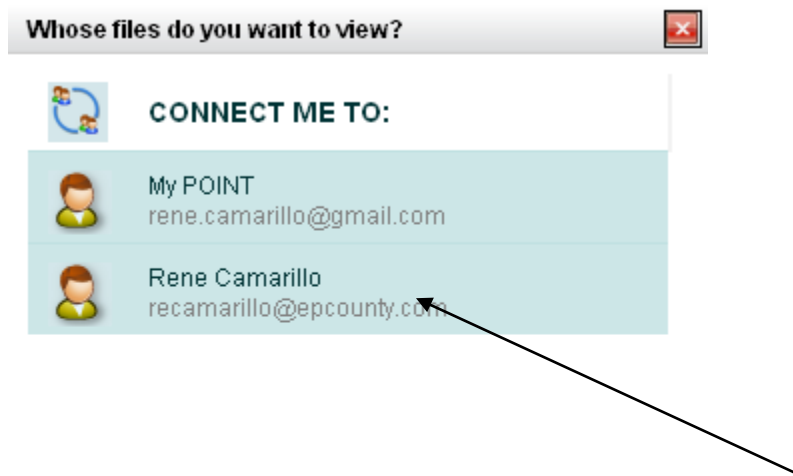
You should now be able to view the General Membership Public Access and TACA Board file cabinets

If you don't see the TACA File Management System

Click on "My POINT (switch)"



Select "Rene Camarillo" this will take you to the TACA File Management System



- Make this my Default POINT
- Do not show this dialog at login

You also want to check the boxes:
"Make this my Default POINT"
"Do now show this dialog at login"

Examples of folders:

Private Access Only

- TACA Board
 - Permanent Org Files (Only Board Members can Access)
 - Board Members
 - Agendas

- Minutes
- Contracts
- Incorporation
- By-Laws
- Tax Documents

- Committees (Only Committee members and Board Access)
 - Treasurer
 - Audit
 - Education
 - New Auditor Training Subcommittee
 - Past Training Documents
 - 2007
 - 2008
 - 2009
 - On the Road Area Training Subcommittee
 - January
 - 2007
 - 2008
 - 2009
 - July
 - 2007
 - 2008
 - 2009
 - Past Conference Ad Hoc Subcommittee
 - 2007
 - County Auditor Institute
 - Entertainment/Sponsorship
 - Law Study
 - By-Laws
 - Membership
 - Mentoring Subcommittee
 - Directory Subcommittee
 - Comments Newsletter
 - Technology
 - Website
 - Audit Guide/Auditor Handbook
 - Annual Meeting Site

Public Access Only

General Membership Access FMS

- How to use FMS
- Best Practices
 - Accounts Payable
 - Links to Texas Counties Financial Reports

- Links to Texas Counties Budget Reports
- TACA Publications/Updates
 - County Auditor Handbook
 - Access 2010 TACA Directory.PDF
 - Online Information Update (NEW!)
 - County Financial Data Reporting Templates
 - Accounting Financial Data
 - Judicial Financial Data
- Historical Educational Documents
 - New Auditor Training
 - County Auditors Institutes
 - Fall Conferences
- Software Systems
 - Financial
 - Judicial
 - Other
- IRS (with subfolders)
 - County Audits-Samples
 - Audit Guide
 - HR
 - A/P Vendors
 - Jail
 - Sheriff
 - District Clerk
 - County Clerk
 - JPs

Need to post Notice: “Every reasonable effort has been made to review these documents for accuracy. However, if you find an error, please report to Technology Committee Chair. TACA assumes no liability for the use or misuse of any form or document.”