# Variable Naming

Variable Naming is a standard naming convention that gets assigned to a Doc Type. You can select from 21 different fields in any order.

From the menu on the left-side of the screen, click Admin, then click Fileroom > Variable Naming.

### Add Variable Name

1. Click the Add Variable Name button.

			Variable Na	ame Setup		×
* Variable Name 🕑		Static Text 🚱 Select	\$	Doc Type 🕖 Select	\$ Doc Tab 😮 Select	\$
Cabinet 🕢 Select	¢	Sub-Divider 🕥 Select	\$	Folder Select	\$ Date 🜒 Select	\$
Time 😧 Select	¢	Fileroom 🕢 Select	\$	User 🕥 Select	\$ DocID 🕢 Select	\$
Doc Field 1 🚱 Select	\$	Doc Field 2 🚱 Select	÷	Doc Field 3 🚱 Select	\$ Doc Field 4 🚱 Select	÷
Doc Field 5 🚱 Select	\$	Folder Field 1 🕑 Select	\$	Folder Field 2 😮 Select	\$ Folder Field 3 😧 Select	\$
Folder Field 4 🚱 Select	\$	Folder Field 5 🚱 Select	\$	Separator 🚱 Spaces	\$ Se	ave Clear

- 2. Enter a name for the Variable Name.
- 3. Each field will have a dropdown list with numbers 1-21 listed. If you would like to include the field in the document name, the number you select for the field indicates the order. The lowest number will be the first field displayed in the document name.
- 4. You can use the Separator field to choose how you want fields separated within the Doc Name.
- 5. Click the Save button when finished.

#### Assign Variable Name to a Doc Type

- 1. From below the admin menu, click the Doc Types
- 2. Click the document type you want to open under the Doc Type column.
- 3. In the pup-up window, select the variable name you want to assign using the Variable Name field.

★ Doc Type © Contract       Workflow © < Select>        Variable Name ©       Template/Proximity © < Select Template>          Retention © < Select>        Bridge © <>        Retention ©       Start Date ©       Start Date ©         OCR Handling © OCR All Pages       © Retention Disabled ©       Do Not Version ©       Hold ©         Last User:       System       Date Added:       0%/12/2020       Date Edited:       01/05/2021         Add Doc Type Field:       A 🖽 🗰 💟 := + 👾 I S       Save       Clear         Field Name       Required       Visible       Size       Unique       Field Type       Mask       Tool Tip       Actions	Doc Type										
Last User:       System System       Date Added:       0%/12/2020       Date Edited:       01/05/2021         Add Doc Type Field:       A ⊞ ⊞ ☑ III + Ų ☑ III       IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	* Doc Type     Contract     Retention        CCR Handling     OCR All Pages	<ul> <li>Wor</li> <li>Brid</li> <li>Z</li> </ul>	kflow <pre>kflow &lt; Select ge </pre> <pre></pre> <pre></pre> <pre>select&gt; Retention Disabled </pre>	>	Variable N     Recurring     Do N	ame 🚱 Workflow 🕲 < Select> ot Version 🚱	÷	Femplate/Proximity 9	< Select Template> \$		
★Field Name         Required         Visible         Size         Unique         Field Type         Mask         Tool Tip         Actions	Last User: System System Add Doc Type Field: A 🖬 🛱	□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	e Added: 08/12/2020	/	Date Edite	d: 01/05/2021			Save Clear		
	★ Field Name	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Actions		

4. Click Save when finished.

#### **Edit Variable Name**

To edit a Variable Name, click the Variable Name to open.

When finished making your changes, be sure to click the Save button.

## **Delete Variable Name**

To delete a Variable Name, click the delete button under the Variable Name column.