



APPLICATION HANDBOOK

APPLICATION:

FILEBOUND

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Application Overview

FileBound provides a user-friendly, powerful end-to-end solution for documents and forms management and workflow automation, with robust analytics and mobile capabilities that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

Usage

Sun Health uses this software for document management, project tracking and invoice processing.

Application Details and Ownership

Application Manager: Gayle Korn

Vendor: Upland FileBound

Vendor POC Name: Kelly Refshauge

Vendor POC Contact Information:

Kelly Refshauge

Customer Success Manager

Document Workflow Cloud

T: 402-858-9710

License Type:

Subject matter expert(S): Gayle Korn, Montana Crosby

Current Release of Software: 7.5.5

Application Location: <https://sunhealthlibrary.FileBound.com/>

Access

Permissions

To be added as a user to FileBound application a CAR request is created by the user's manager and submitted to the IT Helpdesk. Once the CAR form request is received, the IT Department will create a user account and access information (username and temporary password).

How to change your password

- New User Password - When setting up a new user, the IT Department may select to “Force password change at next Login.” You will be prompted to change your password.
- To change your password, log into the program. In upper right-hand corner of screen, click your Display Name to view the dropdown list of options – click Password – change password – Save.

Application Logon

To log on to FileBound application the user will use the following link.

<https://sunhealthlibrary.FileBound.com/LogOn.aspx>

Browser Preference

You may experience a better connection with FileBound application by using the preferred internet browser, **Firefox**.

Application Known Issues / Limitations

No known issues currently.

Modifications

User Guide

The FileBound User Guide can be accessed using the following link: [FileBound User Guide](#)

FileBound Cloud

For information about FileBound Cloud, please view the following document [FileBound Cloud](#)

Purpose

Currently, the software is being used by Sun Health for document management, project tracking and invoice processing.

Introduction

What is FileBound?

FileBound is a web-based office automation management solution that allows you to secure, manage, and distribute all your business documents and information assets regardless of the format, or the source of the documents. The source of information assets can be in the form of physical paper files, archival box storage, computer generated digital files, scanned documents, e-forms, Extensible Markup Language (XML) data sets, and many other formats. FileBound is designed to accept and combine this disparate content, organize it, store it, distribute it through workflow, and provide secured access to users anywhere, anytime.

FileBound Basic Concepts

What is a File?

FileBound is designed based on a real-life scenarios where physical files (or folders) are used to store and organize related documents within a filing cabinet. A similar organization method is represented in FileBound where "file" refers to a searchable container for various types of related documents; it must not be confused with a computer "file". For example, suppose you have a filing cabinet for storing and organizing loan files of customers. Imagine that you have put a sticker on the cabinet bearing the name "Loan Files". The filing cabinet contains several plastic files or folders containing paper documents on loan records. Among several other files, suppose you have stored a file that belongs to "Keith Adams". When you open this file, it may contain several paper documents with one or more pages. You can represent a similar scenario in FileBound. You will need to scan the documents first to make the

documents available in FileBound in digital format. Then, you can create a project, name it "Loan Files", and add a file for "Keith Adams". You can store all the documents belonging to Keith in his file.

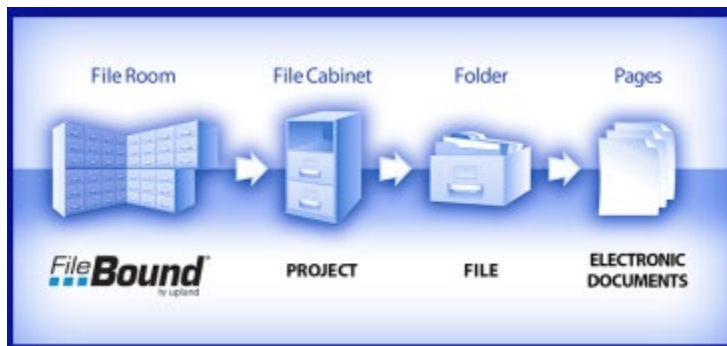
FileBound allows you to create index fields for files in a project. You can search for the file based on any combination of index values. For example, if you have added the index field "Name" to the "loan files" project then you can find Keith's file easily by specifying "Keith" as a search parameter. However, note that the result will return file records of all customers with "Keith" as their name.

What is a Document?

FileBound allows you to work with a wide range of document types. You can scan and save documents directly into a specific location in a file or import documents into a specific location in a file within a project. FileBound provides a viewer tool to view and work with documents.

What is a Project?

A project is the highest level and broadest level of organization that can be created within FileBound. It is designed based on real life traditional methods by which files and paper documents are organized physically in a filing cabinet.



A project must be created and set up first, FileBound comes with some useful project templates that can be installed readily.

What is a Divider?

The documents stored within a project file can be grouped logically according to dividers. You can set up dividers while setting up a project or enter a divider name when adding content to the system. Dividers set up for a project are available to all the files in the project. Once you have a divider in place, you can scan or add a document to the divider. You can also copy and paste documents from other dividers.

Example

Keith Adam's file may contain documents that deal with general correspondence about a loan application and the loan application received from him. You can set up two dividers 'General Correspondence' and 'Loan Applications'.

Once the dividers are added, you can scan or add documents to the appropriate divider so that the documents are grouped meaningfully for easy retrieval. You can search for a file by selecting a divider name as a search parameter using the advanced search options. Dividers also allow you to add an optional master sheet to a file. You can use a master sheet to keep an updated summary of the file.

You cannot delete a master sheet. FileBound displays a divider within a file, if it has at least one document attached to it. When you add or scan a document to a file without specifying a divider or a separator, FileBound inserts a default divider named '<>'. Divider security can be turned on that limits a group of users only providing access to specific dividers.

What is a Separator?

A Separator can be used to group Divider's in logical order in a file. Separators must be enabled in FileBound if the feature is to be used.

What is a User?

A FileBound user can log into FileBound using a username and password to perform operations for which the user has the proper rights. FileBound allows an unlimited number of users to be created within the system. Users can be set up with specific rights according to grouping requirements. Operations that a user will be allowed to perform depends on the group the user belongs to.

What is a System Administrator?

A user with system administration rights has complete access to FileBound and is usually referred as a System Administrator. A System Administrator can create, configure, and manage users, groups, projects, and vendors. System Administrator rights can be assigned to one or more FileBound users.

What is an Access Administrator?

A user with Access Administrator rights can manage users and groups from the FileBound Central Administration console. The Access Administrator has no access to projects or other system configurations.

What is a Group?

FileBound allows creation of different user groups based on roles in the project.

For example, you can create a group of users that perform data entry only, while another group of users takes care of project administration. FileBound allows users to be assigned to one or more such groups. The same user can be assigned to one or more groups. Just like users, one or more projects are assigned to a group. The same project can be assigned to more than one group.

When groups are created, a system administrator can create an unlimited number of users. You can assign various rights related to files, documents, annotations, and workflow to a group. You can set various file and file level security options for a group. You can assign dividers and separators to a group. You can configure FileBound for a group, so that, when new files are added, the files will be available on the clipboard.

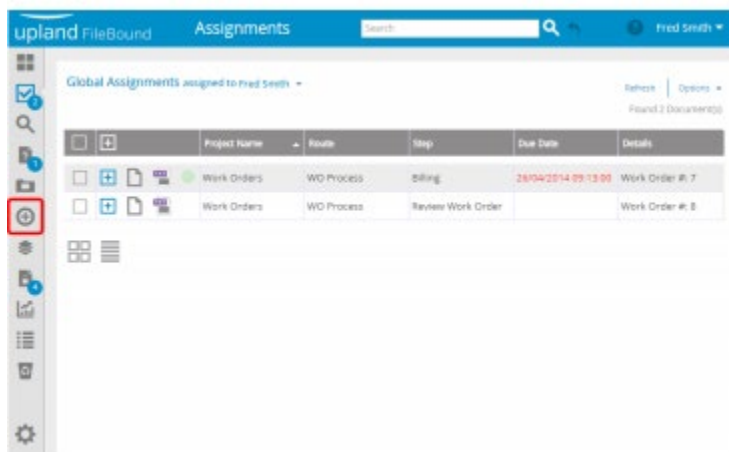
The System Administrator can create a special group for the Project Administrators. Users assigned to the Project Administrator group can manage the projects assigned to this group.

Working with FileBound

How to Open the File Entry Page

1. Click the add content icon on the navigation pane. The ADD CONTENT menu appears.
2. Click File Entry.

The File Entry page appears.



How to Select a Project

- Select a project from the **Project** list, to perform the search within that project. **Projects** are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.

How to Specify Details

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note:** You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

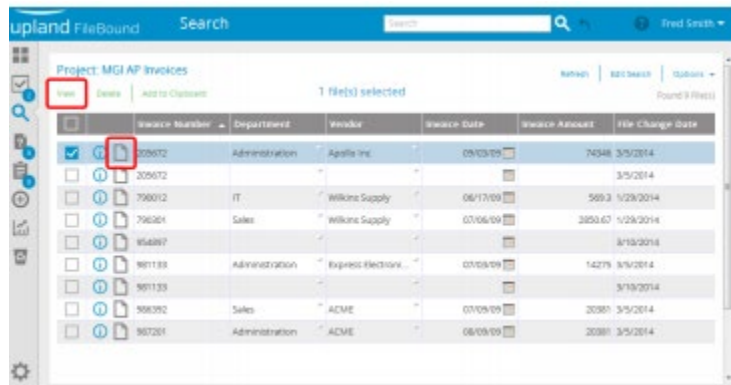
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens. **Note:** The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

How to open the Viewer

1. Click the view icon on any one of the files that you want to view.
Or
Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Web Viewer**.



Note: The **Web Viewer** must be set as the default viewer from the **User Preferences**.

Note: If the document is locked by another user, a prompt is displayed within the **Viewer** mentioning the name of the user that has locked the document.

How do I make an entry for a file?

1. Open the Search Page (*Refer to how to Open the Search Page*)
2. Specify Details (*Refer to Specify Details*)
3. Upload Documents

The **Other Options** section is displayed if you have selected **Upload Documents** option.

1. You can select a divider you want to place the uploaded document in from the **Divider** list.
2. You can drag and drop documents within the drop documents section, to upload the documents.
Or
You can click the **Browse** icon, to open the **Open** dialog box.
3. Select the documents you want to upload, and then click **Open**.

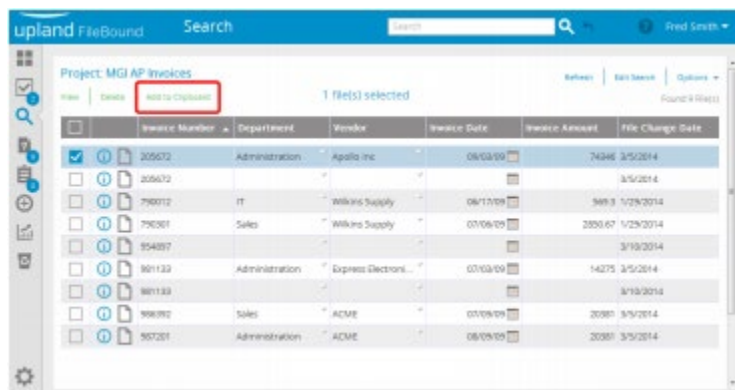
How do I add a file to the clipboard?

1. Open the Search Page (Refer to how to Open the Search Page)
2. Select a Project (Refer to how to Select a Project)
3. Specify the Search Criteria (Refer to Specify Details)
4. Select a File
 - Select the check box adjacent to the file you want to add to the **Clipboard**.

Invoice Number	Department	Vendor	Invoice Date	Invoice Amount	File Change Date
205672	Administration	Agallo Inc.	05/03/14	74048	3/5/2014
205672					3/5/2014
796012	IT	Wilkins Supply	06/17/14	569.3	1/29/2014
796261	Sales	Wilkins Supply	07/06/14	2856.67	1/29/2014
804887					3/19/2014
801133	Administration	Express Electronics	07/08/14	14279	3/5/2014
801133					3/19/2014
808392	Sales	ACME	07/09/14	20381	3/5/2014
807261	Administration	ACME	08/09/14	20381	3/5/2014

5. Add File to Clipboard (Copy)

- Click **Add to Clipboard**, to add the selected file to the **Clipboard**.



How do I add a file to the clipboard from the Webviewer?

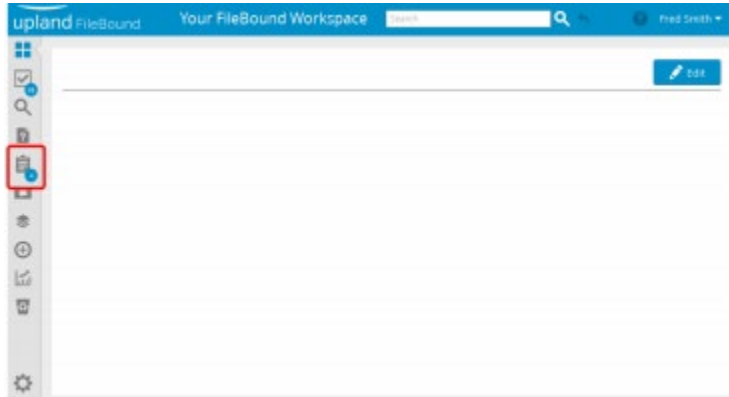
1. Open the Search Page (Refer to how to Open the Search Page)
2. Select a Project (Refer to how to Select a Project)
3. Specify the Search Criteria (Refer to Specify Details)
4. Open the Viewer (Refer to How to Open the Viewer)
5. Add File to the Clipboard
 1. **Right-click** the file you want to add to the clipboard.
 2. Select **Assign to Clipboard** from the menu.



How do I view items that are on the clipboard?

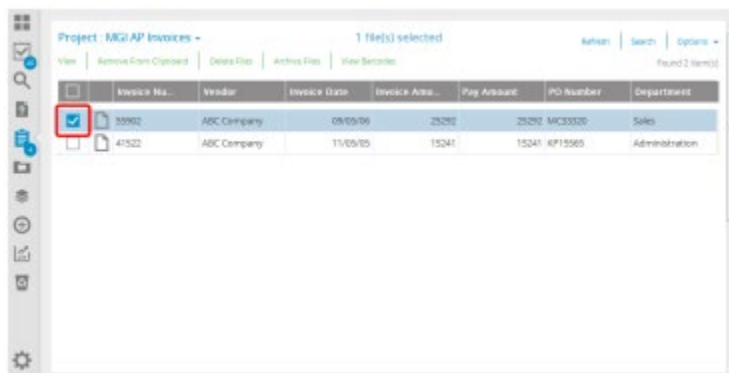
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



2. Select a File

- Select the check box adjacent to the file you want to view.

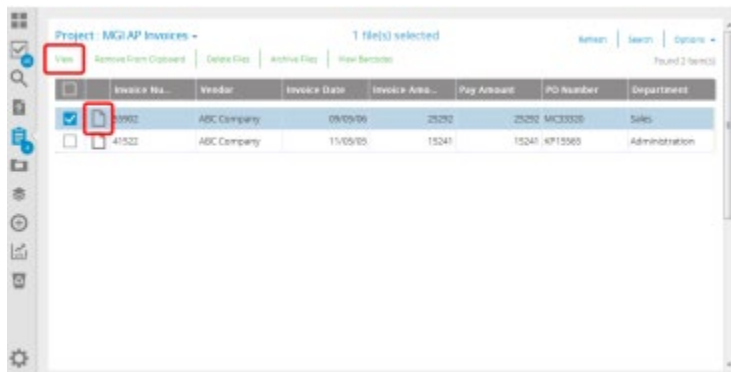


3. View the File

- Click the view icon on any one of the files that you want to view.

OR

- Select the check box next to the file that you want to view.
- Click **View**, to open the file in the **Viewer**.



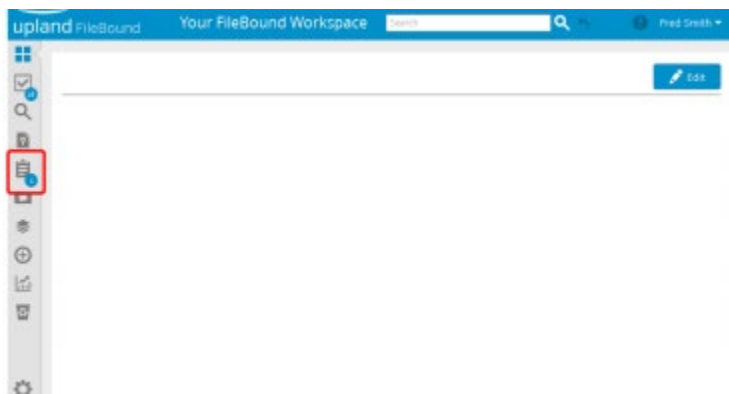
Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**.

Note: If the document is locked by another user, a prompt is displayed within the **Viewer** mentioning the name of the user that has locked the document.

How do I remove a file from the clipboard?

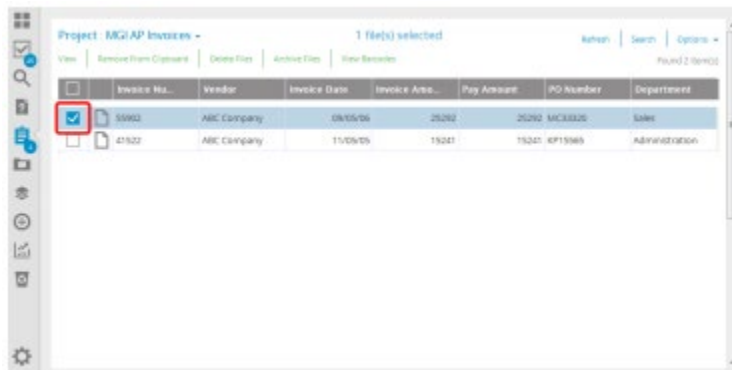
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane.
The **Clipboard** page opens.



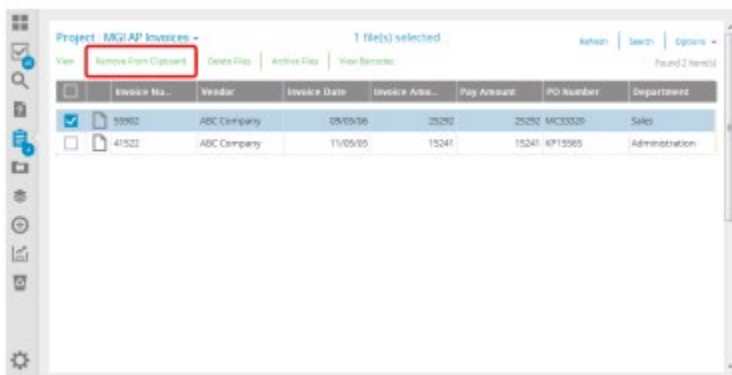
2. Select a File

- Select the check box adjacent to the file you want to remove from the **Clipboard**.



3. Remove the File

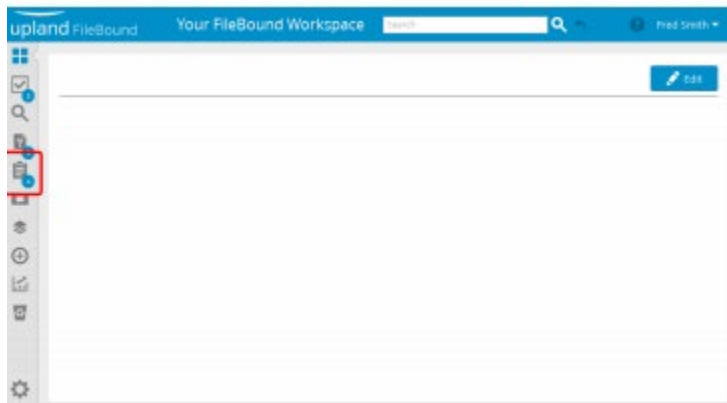
- Click **Remove From Clipboard**, to remove the file from the **Clipboard**.



How do I assign all items on the clipboard to a different user?

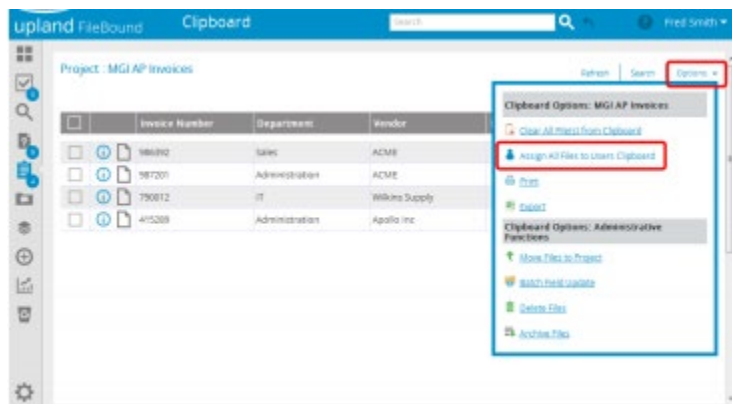
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane.
The **Clipboard** page opens.



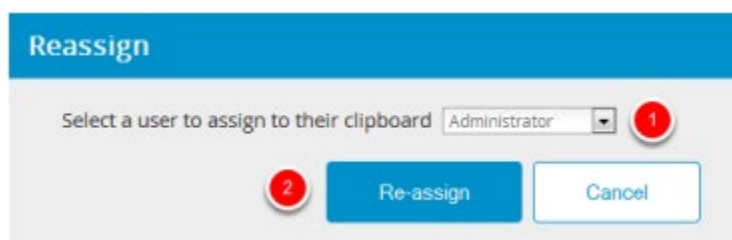
2. Open Reassign Dialog Box

- Click **Assign All Files to Users Clipboard** from the **Options** menu within the **Clipboard** page. The **Reassign** dialog box opens.



3. Select a User

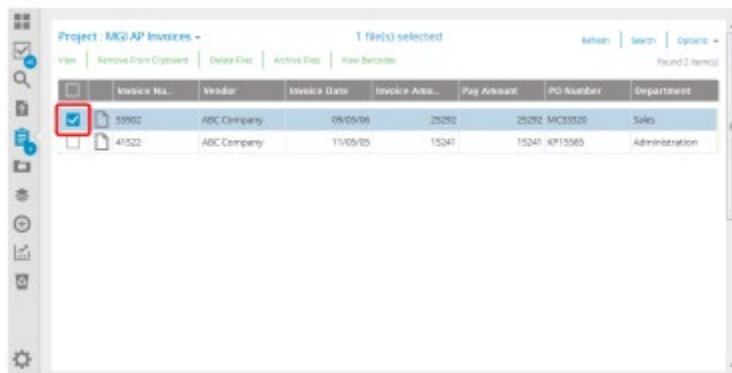
- Select a user from the **Select a user to assign to their clipboard** list.
- Click **Re-assign**.



How do I create a barcode break sheet?

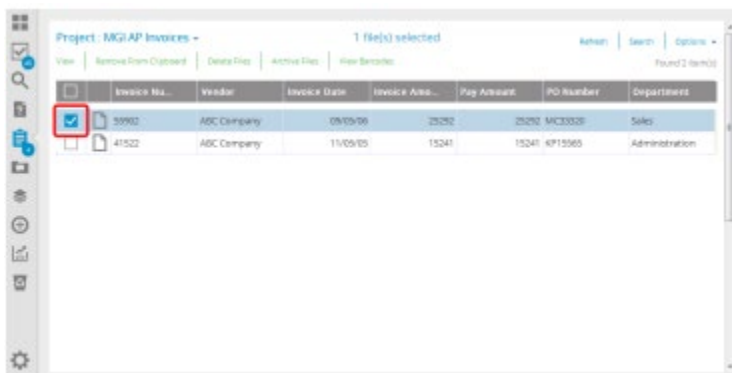
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



2. Select a File

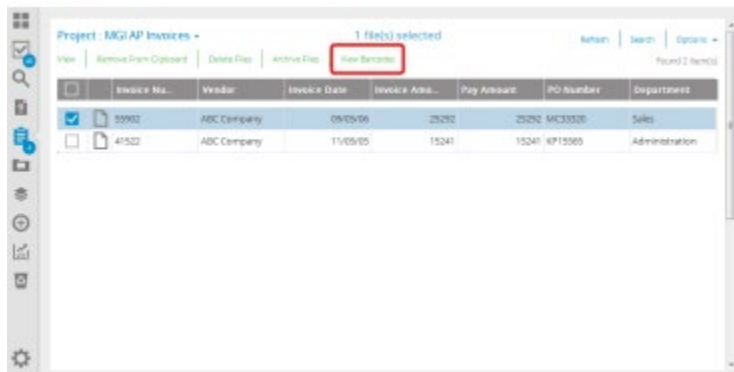
- Select the check box adjacent to the file for which you want to print the barcode.



Note: You can select the check boxes for multiple files, to print barcode for more than one file.

3. Click View Barcodes

- Click **View Barcodes**. The **Print Barcode** window opens.



4. Select Fields

You can select the fields for which you want to print the barcodes.

- Select the check box in the header row to select all the fields.

Or,

Select the check box of the field you want to skip from printing barcode.

Or,

Select the **Key Field Only** check box on the top right to print the barcode for the key fields only.

Print Barcode

☐ Key Field Only Multiple Dividers/Separators

	Field Name	Field Value
<input type="checkbox"/>	Skip This Field	Invoice Number
<input checked="" type="checkbox"/>	Skip This Field	Department
<input type="checkbox"/>	Skip This Field	PO Number
<input checked="" type="checkbox"/>	Skip This Field	Vendor
<input type="checkbox"/>	Skip This Field	Invoice Date
<input type="checkbox"/>	Skip This Field	Invoice Amount
<input type="checkbox"/>	Skip This Field	Pay Amount

Key Field in Red

Separator:

Divider:

Print Barcode

5. Select a Separator

- You can select a separator from the **Separator** list.

Print Barcode

☐ Key Field Only Multiple Dividers/Separators

<input type="checkbox"/>	Field Name	Field Value
<input type="checkbox"/> Skip This Field	Invoice Number	886202
<input checked="" type="checkbox"/> Skip This Field	Department	Sales
<input type="checkbox"/> Skip This Field	PO Number	705-55555
<input checked="" type="checkbox"/> Skip This Field	Vendor	ACME
<input type="checkbox"/> Skip This Field	Invoice Date	07/09/2009
<input type="checkbox"/> Skip This Field	Invoice Amount	20381.00
<input type="checkbox"/> Skip This Field	Pay Amount	20641.00

Key Field in Red

Separator:

Divider:

Print Barcode

6. Select a Divider

- You can select a divider from the **Divider** list.

Print Barcode

☐ Key Field Only Multiple Dividers/Separators

<input type="checkbox"/>	Field Name	Field Value
<input type="checkbox"/> Skip This Field	Invoice Number	886202
<input checked="" type="checkbox"/> Skip This Field	Department	Sales
<input type="checkbox"/> Skip This Field	PO Number	705-55555
<input checked="" type="checkbox"/> Skip This Field	Vendor	ACME
<input type="checkbox"/> Skip This Field	Invoice Date	07/09/2009
<input type="checkbox"/> Skip This Field	Invoice Amount	20381.00
<input type="checkbox"/> Skip This Field	Pay Amount	20641.00

Key Field in Red

Separator:

Divider:

Print Barcode

7. Print Barcodes

- Click **Print Barcode**.

Print Barcode

☐ Key Field Only Multiple Dividers/Separators

	Field Name	Field Value
<input type="checkbox"/> Skip This Field	Invoice Number	986292
<input checked="" type="checkbox"/> Skip This Field	Department	Sales
<input type="checkbox"/> Skip This Field	PO Number	799-55555
<input checked="" type="checkbox"/> Skip This Field	Vendor	ACME
<input type="checkbox"/> Skip This Field	Invoice Date	03/06/2009
<input type="checkbox"/> Skip This Field	Invoice Amount	20387.00
<input type="checkbox"/> Skip This Field	Pay Amount	29641.00

Key Field is Red

Separator:

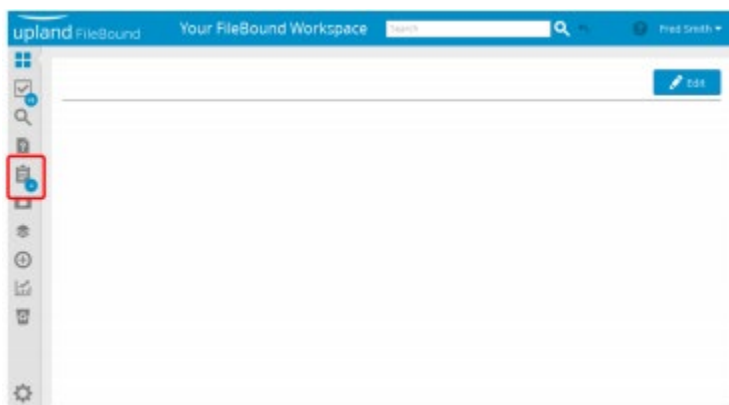
Divider:

Print Barcode

How do I create a break sheet for multiple dividers?

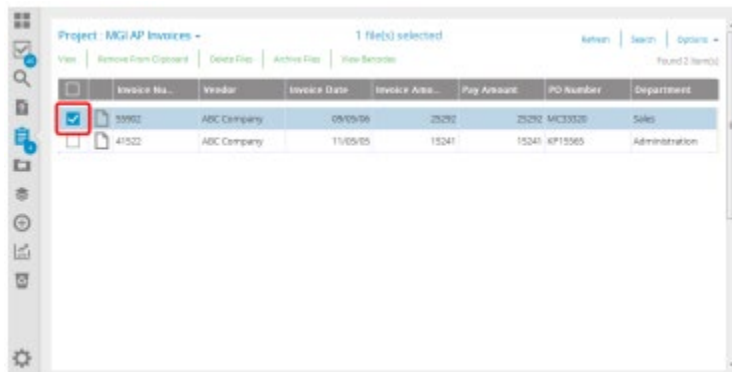
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane.
The **Clipboard** page opens.



2. Select a File

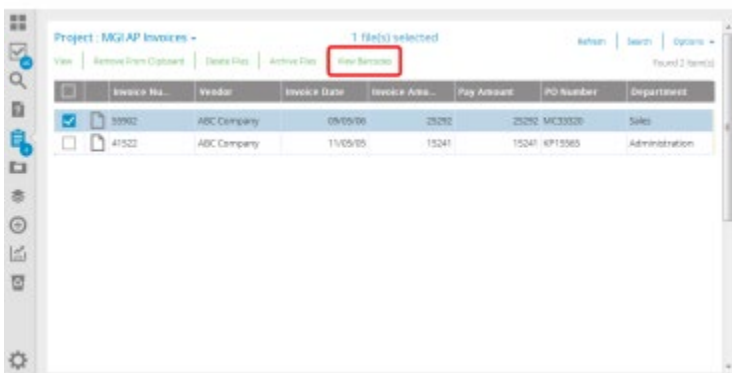
- Select the check box adjacent to the file for which you want to print the barcode.



Note: You can select the check boxes for multiple files, to print barcode for more than one file.

3. Click View Barcodes

- Click **View Barcodes**. The **Print Barcode** window opens.



4. Click Multiple Dividers/Separators

- Click **Multiple Dividers/Separators** within the **Print Barcode** window.

Print Barcode

☐ Key Field Only

Multiple Dividers/Separators

	Field Name	Field Value
<input type="checkbox"/> Skip This Field	Invoice Number	596302
<input type="checkbox"/> Skip This Field	Department	Sales
<input type="checkbox"/> Skip This Field	PO Number	789-55055
<input type="checkbox"/> Skip This Field	Vendor	ACHS
<input type="checkbox"/> Skip This Field	Invoice Date	07/09/2009
<input type="checkbox"/> Skip This Field	Invoice Amount	25387.00
<input type="checkbox"/> Skip This Field	Pay Amount	25647.00

Key Field in Red

Separator:

Divider:

Print Barcode

5. Select Dividers

- You can select the check boxes adjacent to the dividers from the **Divider** list, to print barcodes for the selected dividers.

The screenshot shows a web application interface titled "Print Barcode". At the top right is a "Back" button. Below the title bar, there are two expandable sections. The first section, "Dividers", is expanded and shows a list of items: "INVOICE" (checked), "SUBMITTED" (checked), and "Sales Representative" (unchecked). A red box highlights the checked checkboxes. The second section, "Separators", is collapsed. At the bottom right is a "Print Barcode" button.

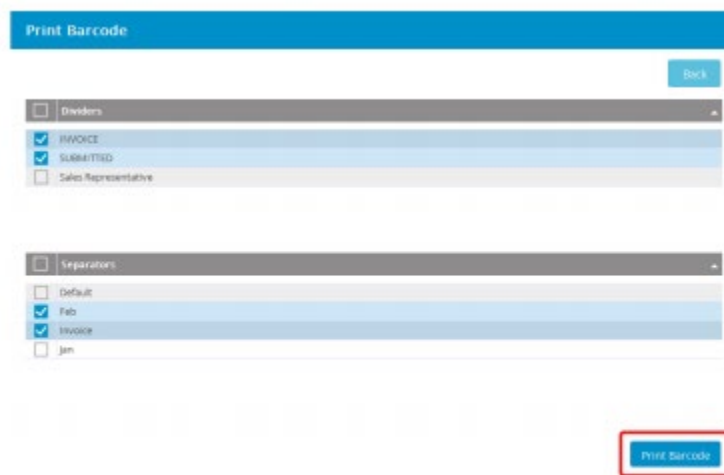
6. Select Separators

- You can select the check boxes adjacent to the separators from the **Separator** list, to print barcodes for the selected separators.

This screenshot shows the same "Print Barcode" interface, but with the "Separators" section expanded. The "Dividers" section remains expanded with "INVOICE" and "SUBMITTED" selected. The "Separators" section shows a list of items: "Default" (unchecked), "FEB" (checked), "INVOICE" (checked), and "JAN" (unchecked). A red box highlights the checked checkboxes for "FEB" and "INVOICE". The "Print Barcode" button is at the bottom right.

7. Print Barcodes

- Click **Print Barcode**



Using the Viewer

How do I view a document listed in the Search Results?

The **Search Results** page displays a list of files as search result. As a default operation, when two or more files are found using the given search criteria, the **Search Result** page will be displayed. If there is only one record matching the search criteria, the **File Detail** page for that file will be displayed.

Note: The **File Details** page is available, if it is enabled by the System Administrator. However, if the **View Documents on Single Search Result** option is selected within the **User Preferences**, the documents for the single file is displayed using the default document viewer.

1. Open the Search Page (*Refer to How to Open the Search Page*)
2. Select a Project (*Refer to How to Select a Project*)
3. Specify the Search Criteria (*Refer to How to Search Criteria*)
4. View the Document (*Refer to How to Search Criteria*)

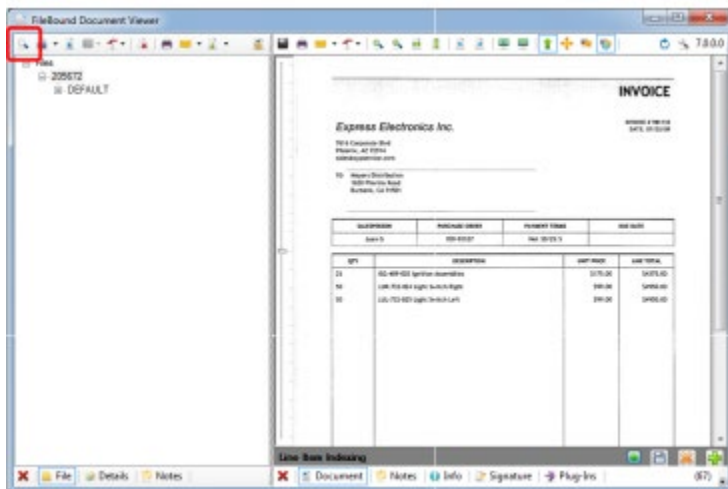
How do I search for files within the Viewer?

You can search for one or more files from the **Viewer** window. You can add one or more files from the search results in the **File Contents** pane in the **Viewer** window.

Note: As a prerequisite, file searching must be enabled by the System Administrator. Working with the **Indexing Queue**.

1. Open the Search Page (*Refer to How to Open the Search Page*)

2. Select a Project (Refer to How to Select a Project)
3. Specify the Search Criteria (Refer to How to Specify the Search)
4. Open the Viewer (Refer to How to Open the Viewer)
5. Open the File Search Dialog Box
 - Click the search icon on the **File Content** toolbar. The **File Search** dialog box opens

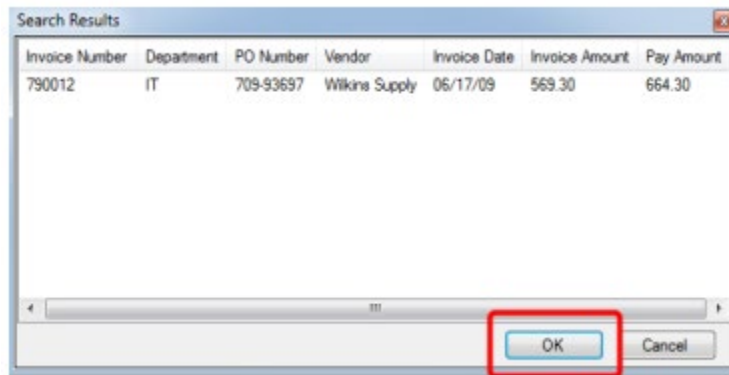


6. Specify the Search Criteria

The screenshot shows the 'File Search' dialog box. It contains several input fields: 'Invoice Number' with the value '790012', 'Department' with a dropdown arrow, 'PO Number' with an empty text box, 'Vendor' with a dropdown arrow, and 'Invoice Date' with two date pickers set to '4/11/2014'. At the bottom, the 'OK' button is highlighted with a red box, and the 'Cancel' button is also visible.

7. Add Files to the File Content Pane

- Select one or more files from the **Search Results** dialog box, and then click **OK**. Selected files from the **Search Results** dialog box are added into the **File Content** pane.



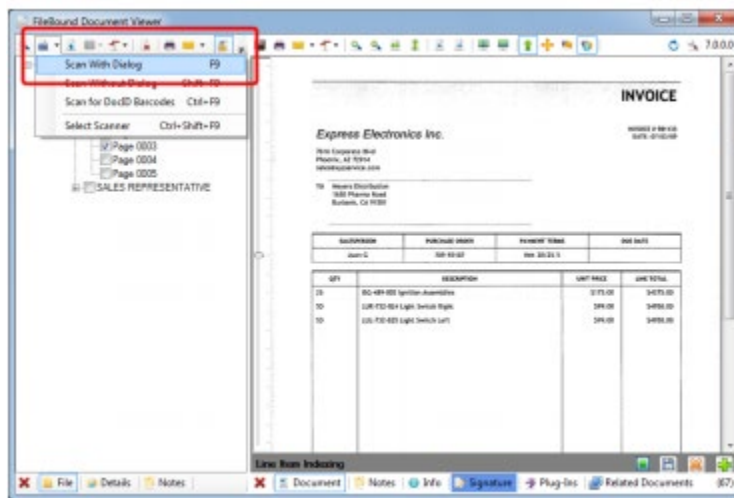
How do I scan pages into the Viewer with scanning dialog?

You can scan pages into the **Viewer** if you have a scanner installed. The **Scan With Dialog** option allows you to scan pages with the dialog option to configure the scanner settings.

1. Open the Search Page (*Refer to How to Open the Search Page*)
2. Select a Project (*Refer to How to Select a Project*)
3. Specify the Search Criteria (*Refer to How to Specify the Search Criteria*)
4. Open the Viewer
5. Open the Document Properties Dialog Box
 1. Click the **Scan** button on the **File Toolbar** within the **Viewer**.
 2. Select the **Scan With Dialog** option from the menu.

Or,

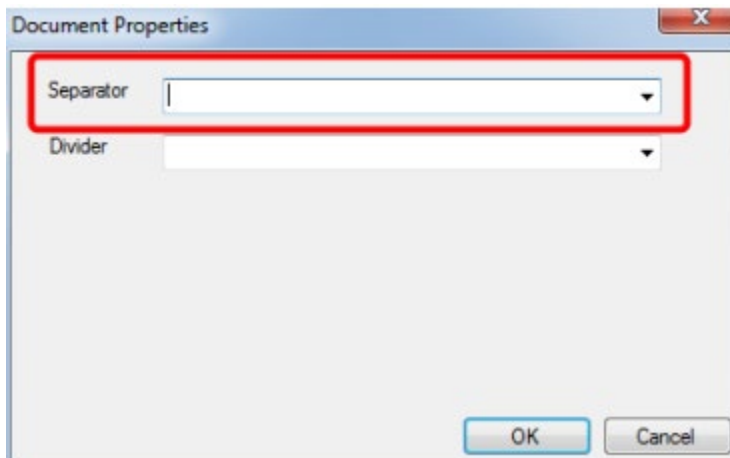
Press the **F9** shortcut key. The **Document Properties** dialog box opens.



6. Select a Separator

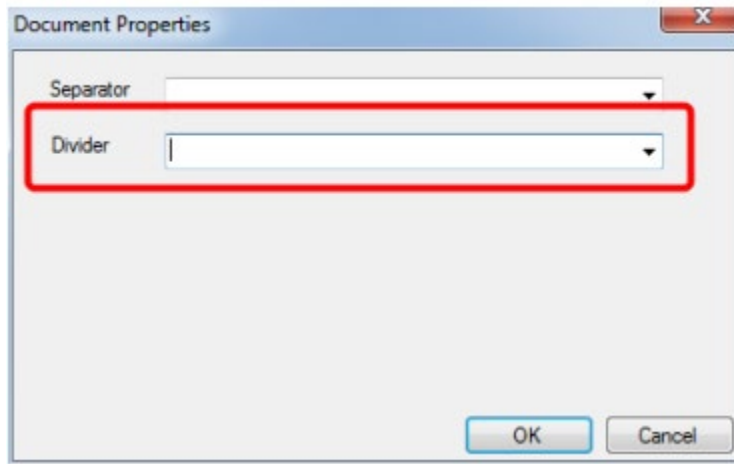
You can select a separator from the **Separator** list to store the scanned pages within the separator.

Note: This is only available if separators have been enabled for the project.



7. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm. The dialog box for setting configuration of the scanner opens.
3. Make required changes to the scanner settings in the scanner settings dialog box.
4. Click **OK** to scan pages.



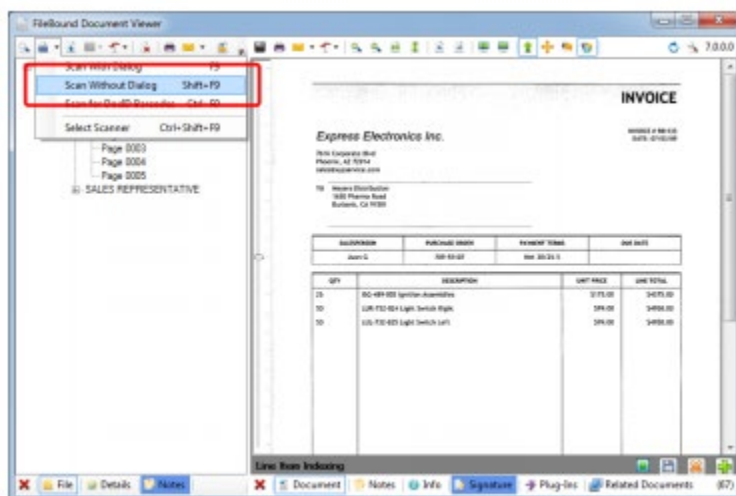
How do I scan pages into the Viewer without scanning dialog?

You can scan pages without a scanning dialog. This allows you to scan with the existing scanner settings.

1. Open the Search Page (*Refer to How to Open the Search Page*)
2. Select a Project (*Refer to How to Select a Project*)
3. Specify the Search Criteria (*Refer to How to Specify the Search Criteria*)
4. Open the Viewer (*Refer to How to Open the Viewer*)
5. Open the Document Properties Dialog Box
 1. Click the scan button on the **File Toolbar** within the **Viewer**.
 2. Select the **Scan Without Dialog** option from the menu.

Or,

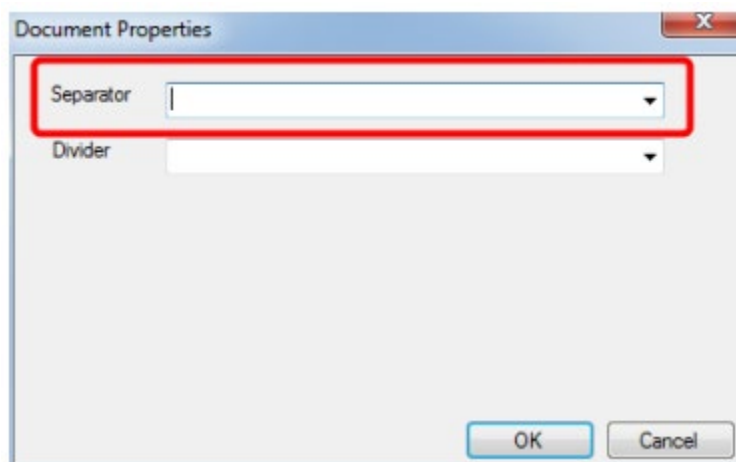
Press the **F9** shortcut key. The **Document Properties** dialog box opens.



6. Select a Separator

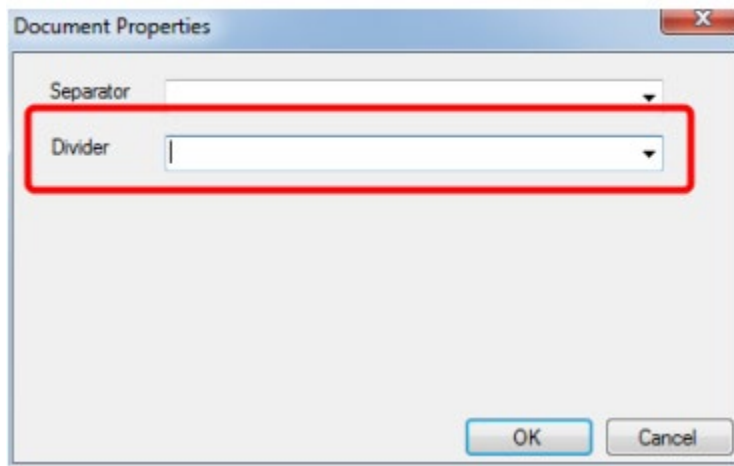
You can select a separator from the **Separator** list to store the scanned pages within the separator.

Note: This is only available if separators have been enabled for the project.



7. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm and scan pages.



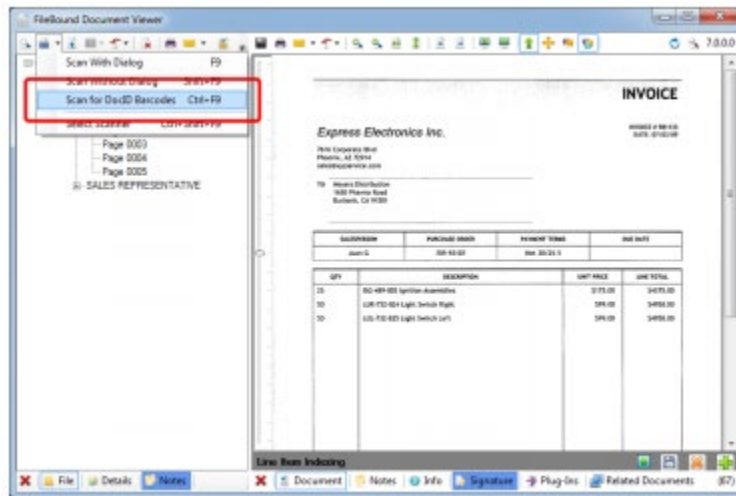
How do I scan for Document ID barcodes within the Viewer?

1. Open the Search Page (*Refer to How to Open the Search Page*)
2. Select a Project (*Refer to How to Select a Project*)
3. Specify the Search Criteria (*Refer to How to Specify the Search*)
4. Open the Viewer
5. Scan for Document ID Barcodes

1. Click the scan button on the **File Toolbar** within the **Viewer**.
2. Select the **Scan for DocID Barcodes** option from the menu.

Or,

Press the **Ctrl + F9** shortcut key, to scan the **E-form ID barcode** printed on a document.



How do I import documents into the Viewer?

You can import one or more documents that are saved on your machine or other network drive into **Viewer**.

1. Open the Search Page

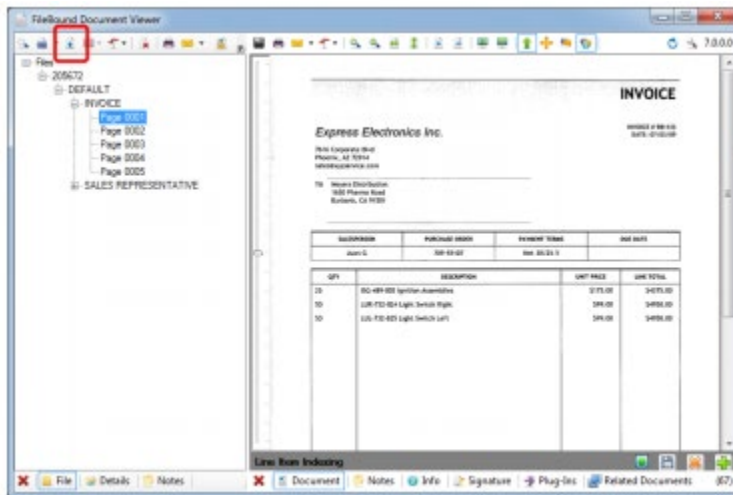
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

5. Open the Select Documents to Import Dialog Box

- Click the import button on the **File Toolbar** within the **Viewer**. The **Select Document(s) to Import** dialog box opens.

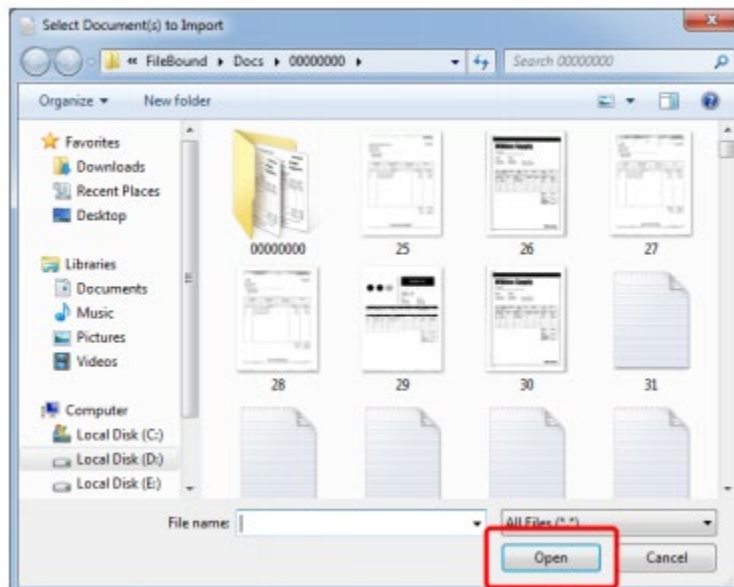


6. Select the Documents to Import

- Select the documents to import.

Note: You can select multiple documents by holding down the **Ctrl** key while selecting the files.

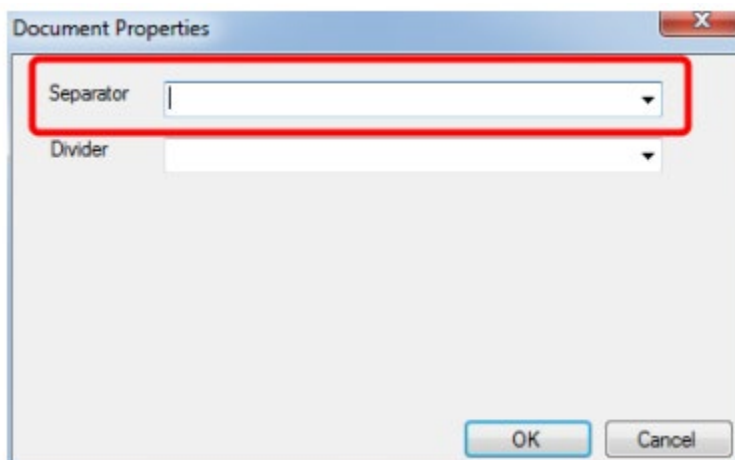
- Click **Open** to confirm file selection. The **Document Properties** dialog box opens.



7. Select a Separator

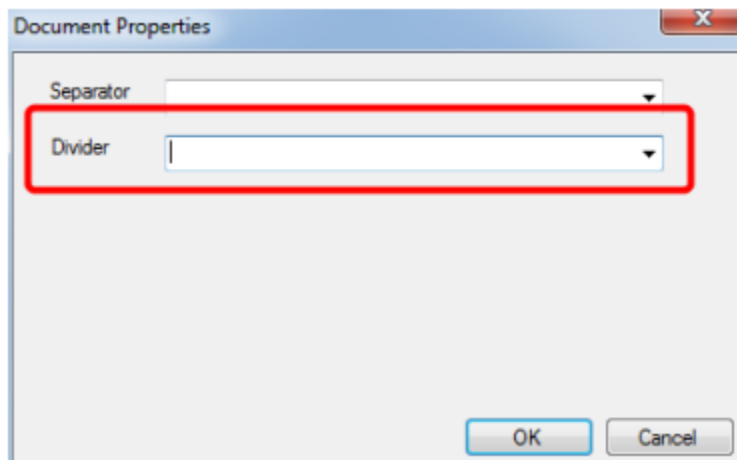
- You can select a separator from the **Separator** list to store the scanned pages within the separator.

Note: This is only available if separators have been enabled for the project.



8. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm



How do I route a document to a predefined workflow route?

You can assign a document to a workflow route from a list of predefined workflow routes. A message is displayed if predefined workflow routes are not available.

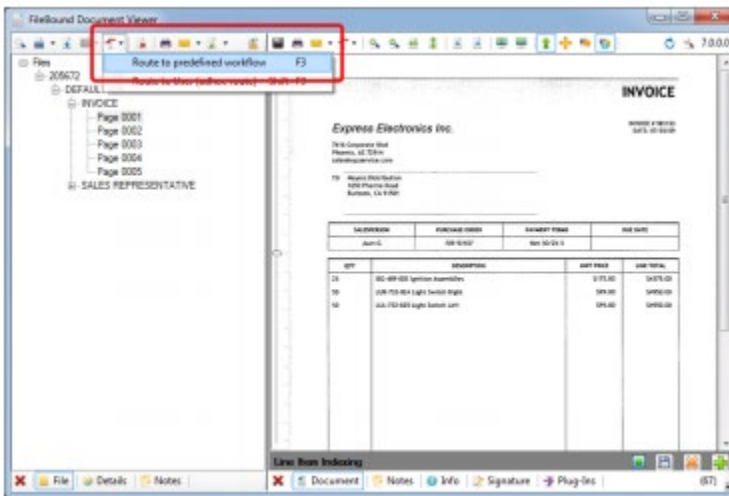
1. Open the Search Page

2. Select a Project**3. Specify the Search Criteria****4. Open the Viewer****5. Open the List of Predefined Workflow**

1. Click the route button on the **File Toolbar** within the **Viewer**.
2. Select the Route to predefined workflow option from the menu.

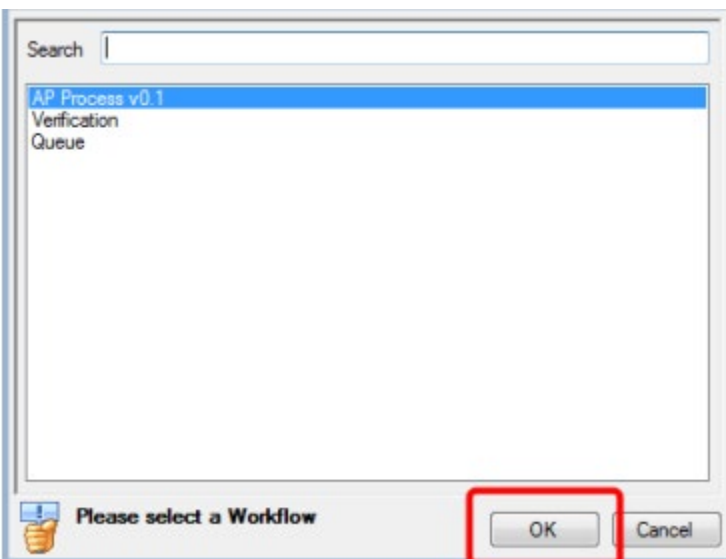
Or,

Press the **F3** shortcut key, to open the list of predefined workflow in a dialog box. If you have selected more than one document then a confirmation dialog box prompts you to confirm that you want to route multiple documents.



6. Select a Workflow Route

1. Select a workflow route from the list.
2. Click **OK** to confirm. A dialog box opens where you can specify a note for the workflow route. The note will be available to the user assigned to the first step in the selected workflow route.

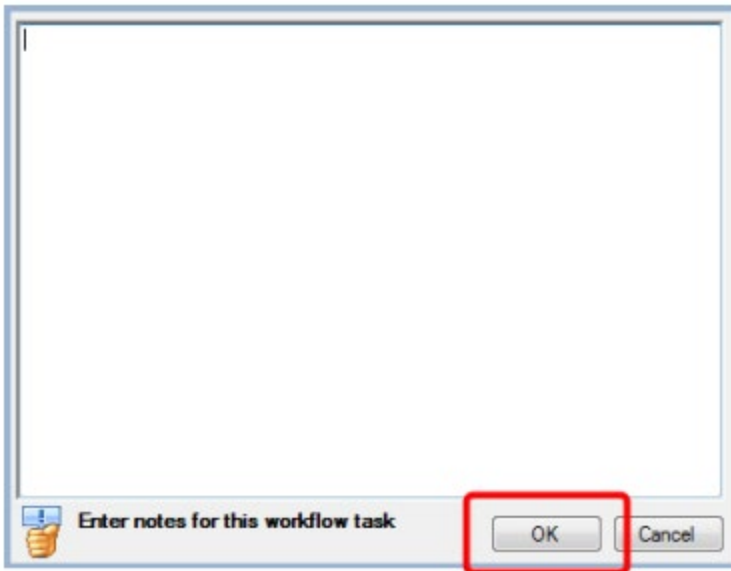


7. Specify a Note

1. Specify the note.
2. Click **OK** to continue.

Note: Specifying a note is not mandatory. You are prompted that the document is routed successfully.

3. Click **OK** to complete the operation.



How do I route a document to a user?

You can route a document to a specific user from a list of available users.

1. **Open the Search Page**

2. **Select a Project**

3. **Specify the Search Criteria**

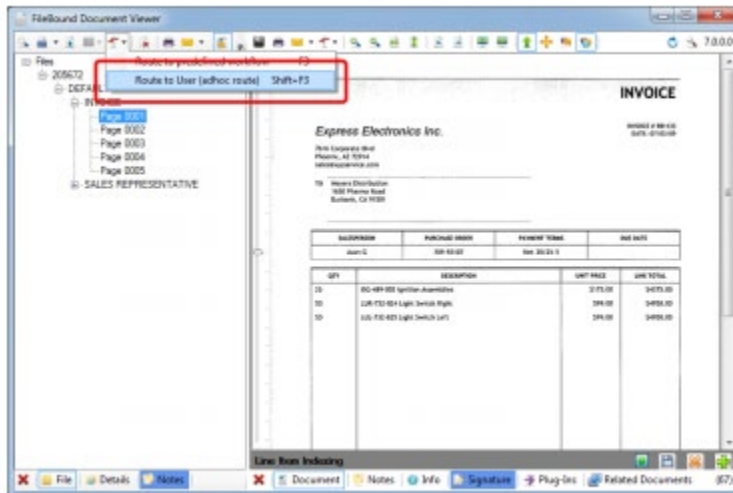
4. **Open the Viewer**

5. **Open the List of Available Users**

1. Click the route button on the **File Toolbar** within the **Viewer**.
2. Select the **Route to User** (adhoc-route) option from the menu.

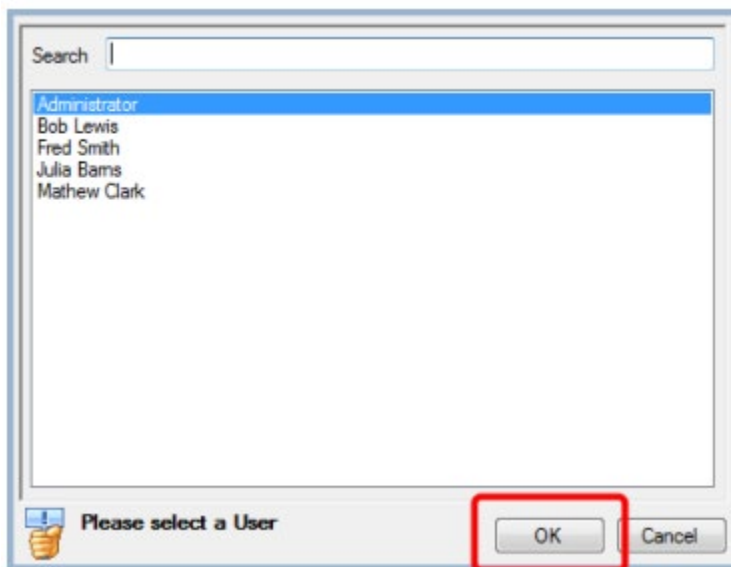
Or,

Press the **Shift + F3** shortcut key, to open the list of users in a dialog box. If you have selected more than one document then a confirmation dialog box prompts you to confirm that you want to route multiple documents



6. Select a User

1. Select a user from the list.
2. Click **OK** to confirm. A dialog box opens where you can specify a note for the ad-hoc workflow route.

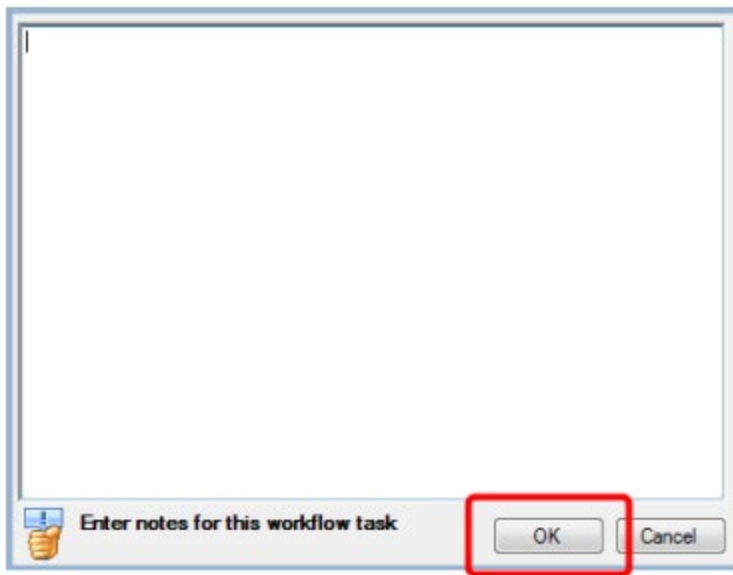


7. Specify a Note

1. Specify the note.
2. Click **OK** to continue.

Note: Specifying a note is not mandatory. You are prompted that the document is routed successfully.

3. Click **OK** to complete the operation.



How do I delete a page in a file within the Viewer?

You can delete one or more pages from a file in the **File Contents** pane of the **Viewer**.

Note: As a prerequisite, you must belong to a group that has the document deleting group right enabled by the System Administrator.

1. Open the Search Page

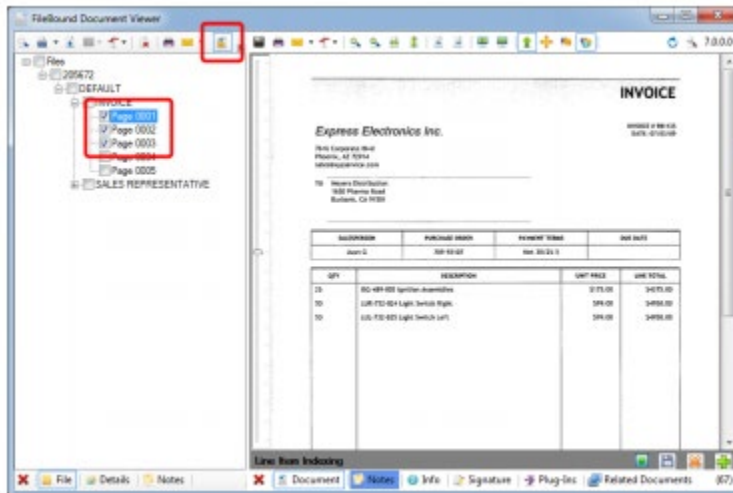
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

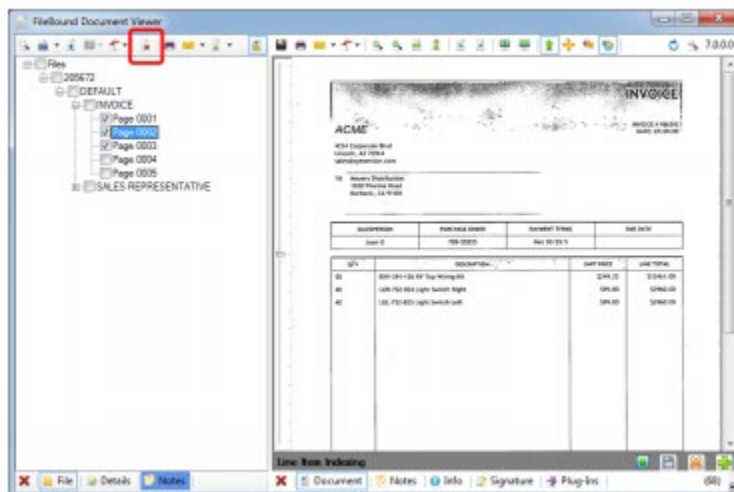
5. Select the Pages

1. Click the toggle icon to use the **Toggle Multi-Select Option** feature.
2. Select the check boxes adjacent to the pages you want to delete.



6. Delete the Pages

- Click the delete button on the **File Toolbar**.
- Or,
- Right-click the selected page node.
 - Select **Delete Document(s)** from the menu. The pages are deleted after confirmation.



How do I display the file details within the Viewer?

1. Open the Search Page

2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

How do I display the document notes for a page within the Viewer?

You can specify a note within a document to provide additional information about the document when viewing it. These notes can also aid in retrieving the document when it is searched for.

1. Open the Search Page

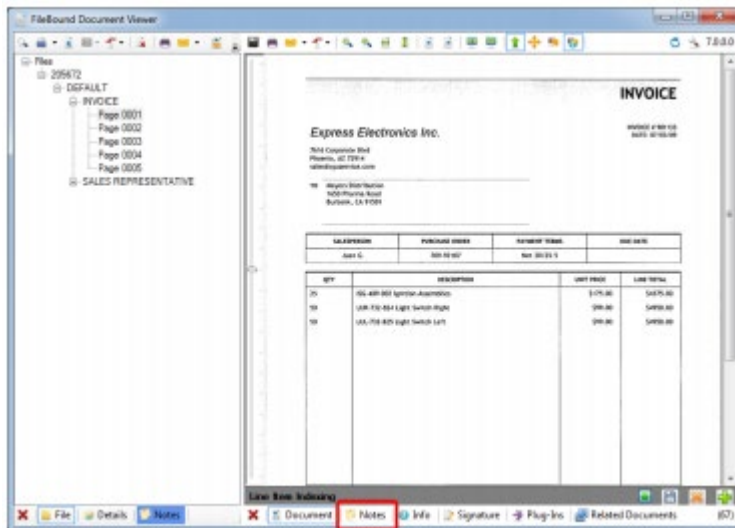
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

5. Display the Document Notes

- Click **Notes** on the taskbar, to display the **Document Notes** pane.



What are the document properties that are displayed within the Viewer?

Below are the document properties that are displayed within the **Viewer**:

Archive: Displays the time when the archive was created and last updated.

Changed By: Displays the name of the user that last made changes to the document.

Divider: Displays the name of the divider that contains the document.

Document ID: Displays the document identification number of the document.

File Size: Displays the size of the document.

File Type: Displays the format of the document.

Last Updated: Displays the date and time when the document was last updated.

Separator: Displays the name of the separator that contains the document.

Sort Order: Displays the sort order of the document.

Document Info

General Full Text

Property	Value
Archive	
Changed By	Fred
Divider	INVOICE
Document ID	67
File Size	19216
File Type	image/tiff (*.tif)
Last Updated	3/11/2014 10:34:00 AM
Separator	DEFAULT
Sort Order	3

How can I see the full text information stored for a document within the Viewer?

When a document is scanned or imported into FileBound's **Optical Character Recognition (OCR)** can be performed on the document and stored. You can also specify full text information for a document or image that is displayed within the **Viewer**. A user can then use this information to search for the document on the **Search** screen and within the **Viewer**.

1. Open the Search Page

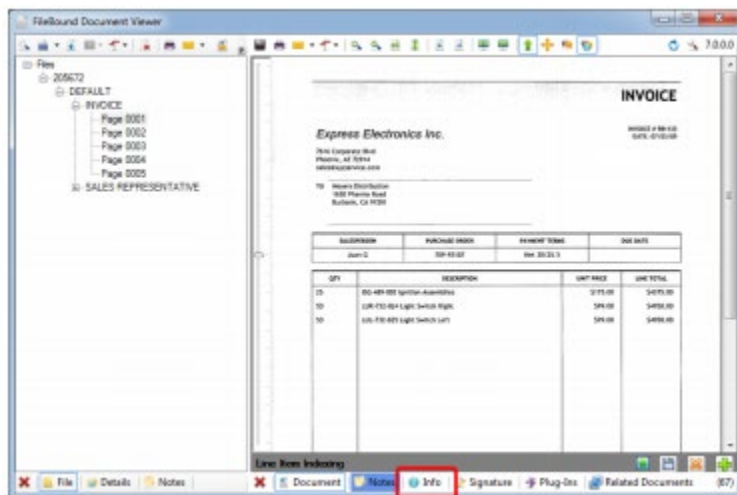
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

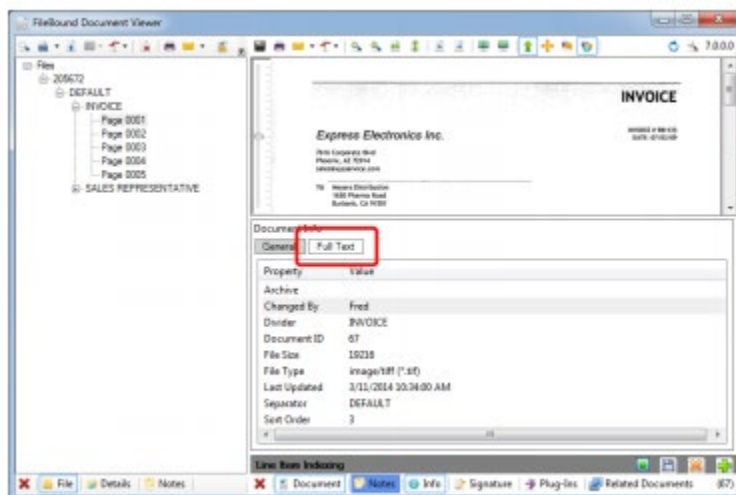
5. Display the Document Information

- Click **Info** on the taskbar, to display the **Document Info** pane.



6. Display the Full Text Information

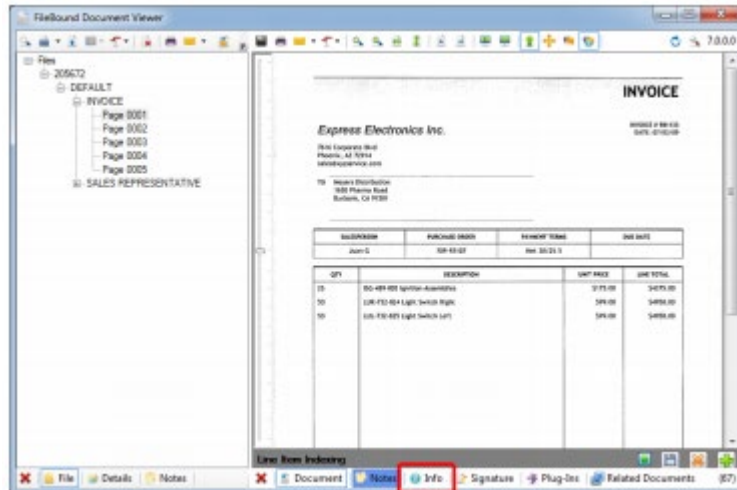
- Click **Full Text** tab within the **Document Info** pane.



How can I edit the full text information that is stored for a document within the Viewer?

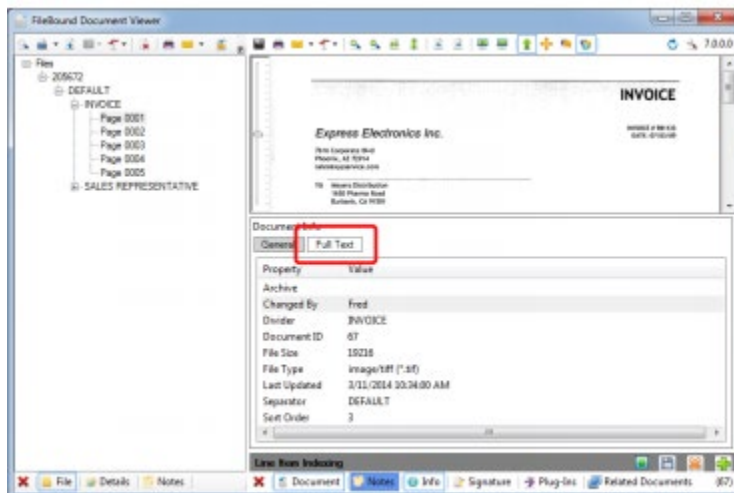
1. Open the Search Page
2. Select a Project
3. Specify the Search Criteria
4. Open the Viewer
5. Display the Document Information

- Click **Info** on the taskbar, to display the **Document Info** pane.



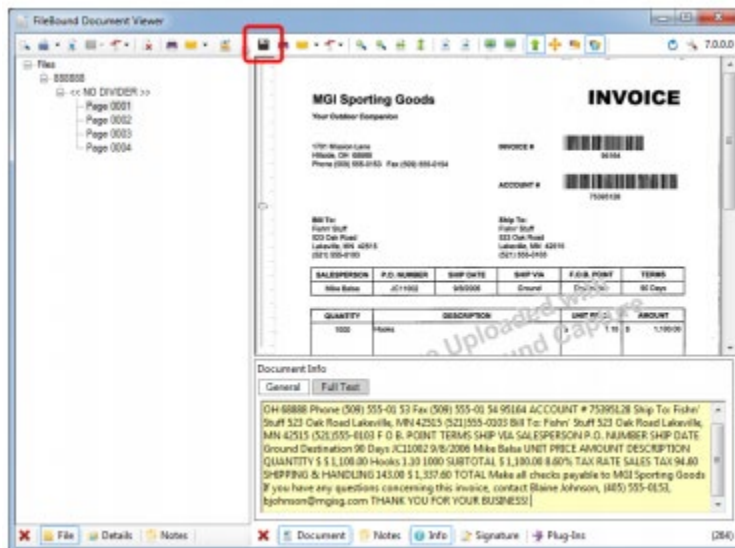
6. Display the Full Text Information

- Click **Full Text** tab within the **Document Info** pane.



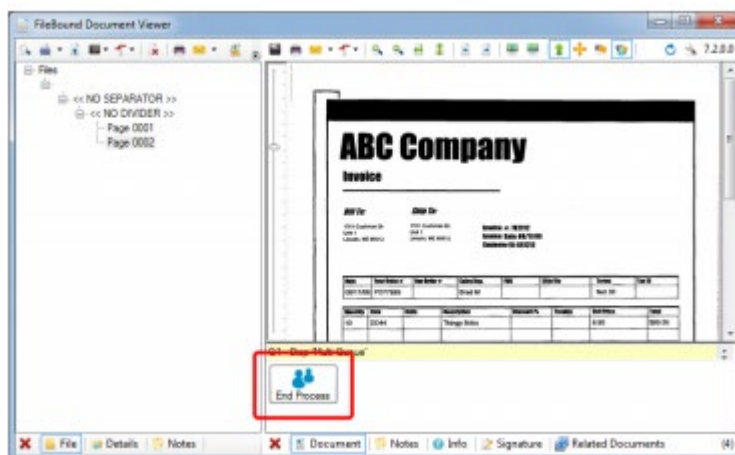
7. Edit the Full Text Information

- Edit the full text information displayed within the **Full Text** tab.
- Click the **Save** button on the document toolbar.



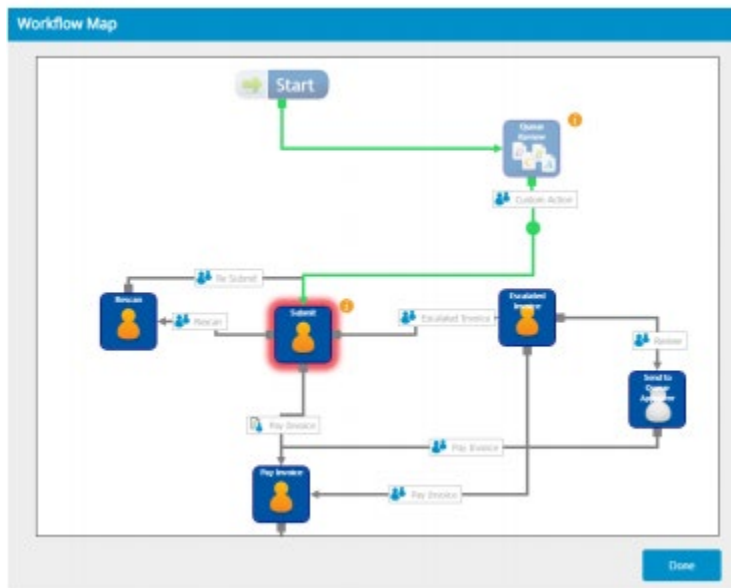
How do I take action on a routed document within the Viewer?

1. Open the Search Page
2. Select a Project
3. Specify the Search Criteria
4. Open the Viewer
5. Take an Action
 - Click a task button to take the action associated to that button.



What is a Workflow Map?

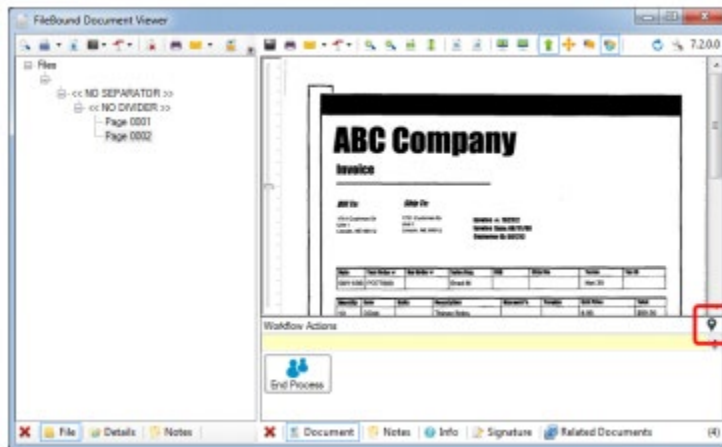
Workflow Map Workflow map allow users to view the step the routed document is currently at within a workflow process. Users can view the entire workflow process, the route the document has passed through, and the next step the document will be routed to. You can click on the information icon adjacent to a step to display the step details.



Note: The information icon is available only for the steps the document has been routed from. For example, in the above image, the document is currently at **Submit** step. The current step of the document is highlighted. The green line from **Start** to the **Submit** step indicated the path the document has followed in the workflow process.

How do I view workflow map for a routed document in the Viewer?

1. **Open the Search Page**
2. **Select a Project**
3. **Specify the Search Criteria**
4. **Open the Viewer**
5. **Open the Workflow Map Dialog Box**
 - Click the map icon within the **Workflow Actions** pane. The **Workflow Map** dialog box opens.



How can I apply a document signature within the Viewer?

You can specify a signature for a document to mark the document as authorized and therefore not editable by any user until the signature is removed. A document signature is an electronic signature that a user applies by entering their FileBound password. The signature consists of the document signature identification number, user name of the person who applied the signature, and the date and time when the signature is added.

Note: The user that is applying the signature must have the '**Document Editing**' group right enabled for the group that they belong to by the System Administrator.

1. Open the Search Page

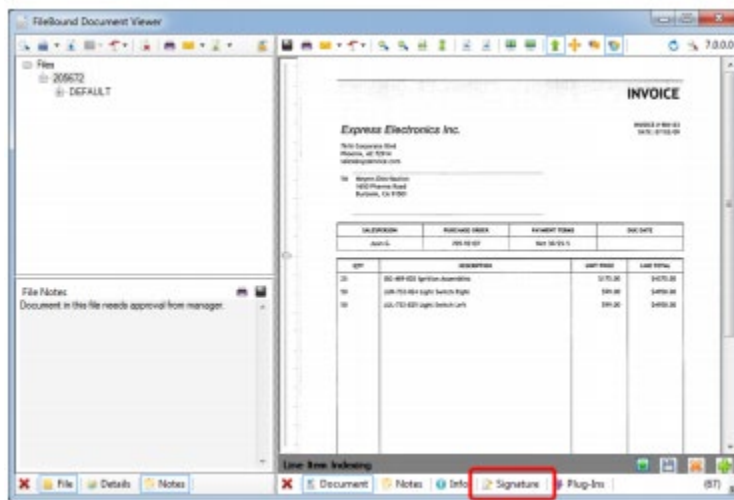
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

5. Display the Document Signature Pane

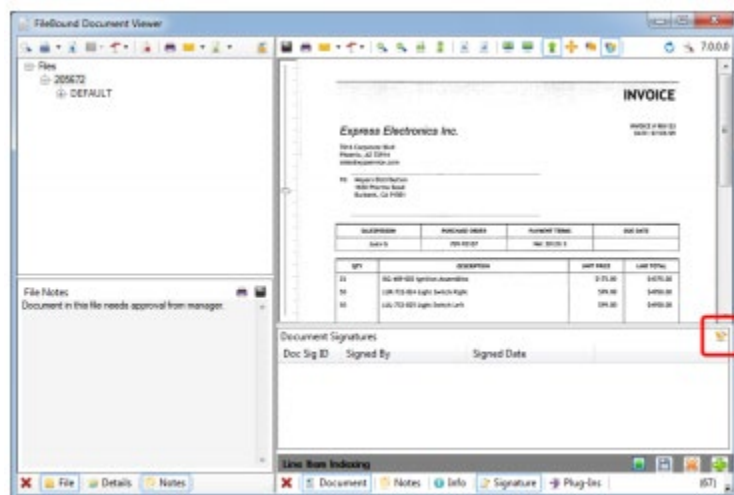
- Click **Signature** on the taskbar, to display the **Document Signatures** pane.



6. Sign the Document

1. Click the sign document icon in the **Document Signatures** pane. A dialog box opens.
2. Specify the password for the currently logged in user within the dialog box, and then click **Save**.

Note: A document can contain only one signature.



How do I remove a document signature within the Viewer?

You can remove the signature from a document when you do not want to keep the signature any more or when you want to edit the document.

1. Open the Search Page

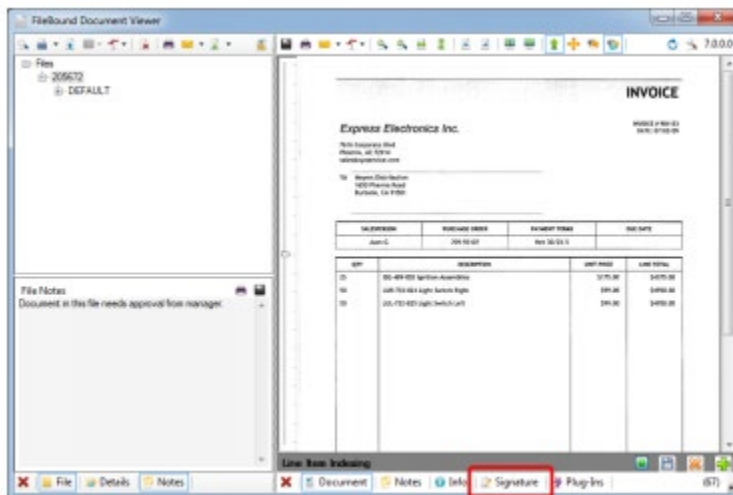
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

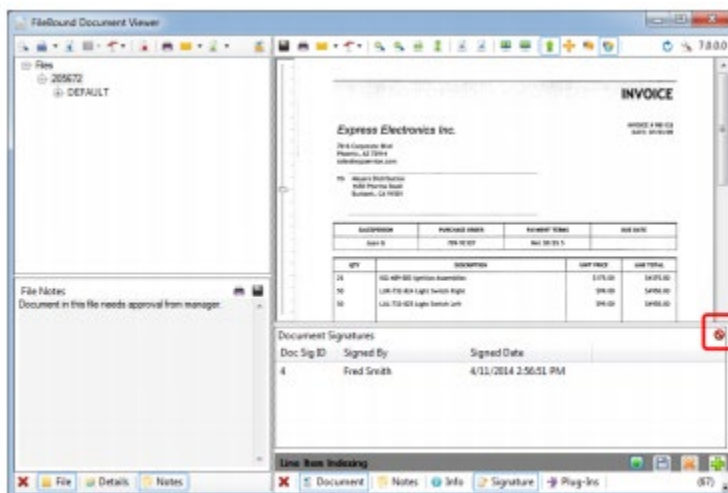
5. Display the Document Signature Pane

- Click Signature on the content taskbar to display the Document Signatures pane.



6. Remove the Document Signature

- Click the delete button within the **Document Signatures** pane.



How do I see who has signed a document within the Viewer?

1. Open the Search Page

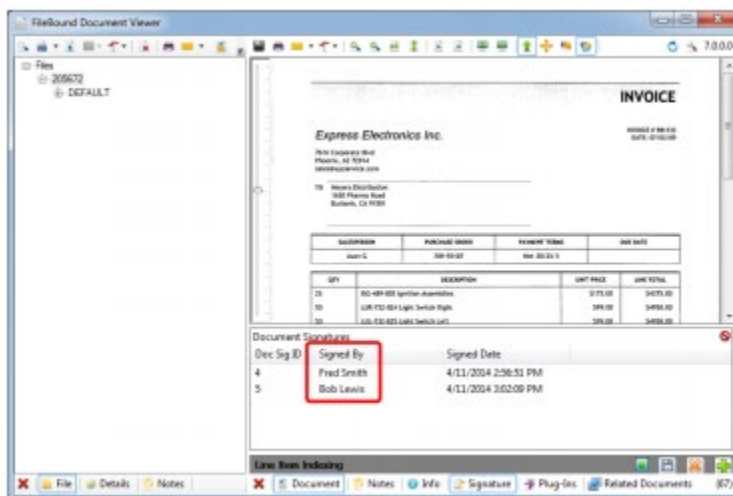
2. Select a Project

3. Specify the Search Criteria

4. Open the Viewer

5. Display the Document Signature Pane

- Click Signature on the content taskbar to display the Document Signatures pane. The name of the user that signed the document last is displayed in the **Signed By** column. Note the latest date and time displayed in the **Signed Date** column.

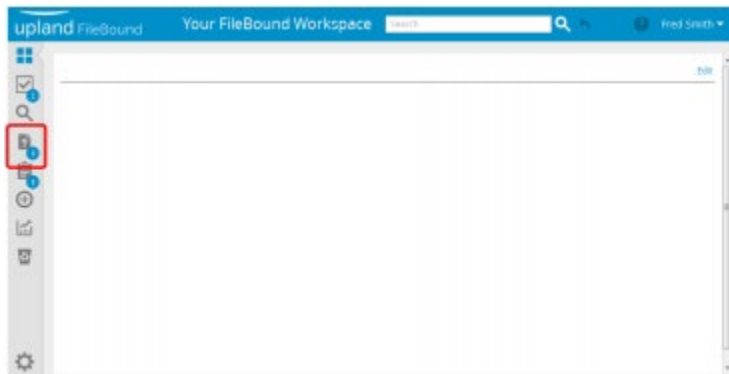


Working With the Indexing Queue

How do I add documents in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.



2. Open the Add Documents Dialog Box

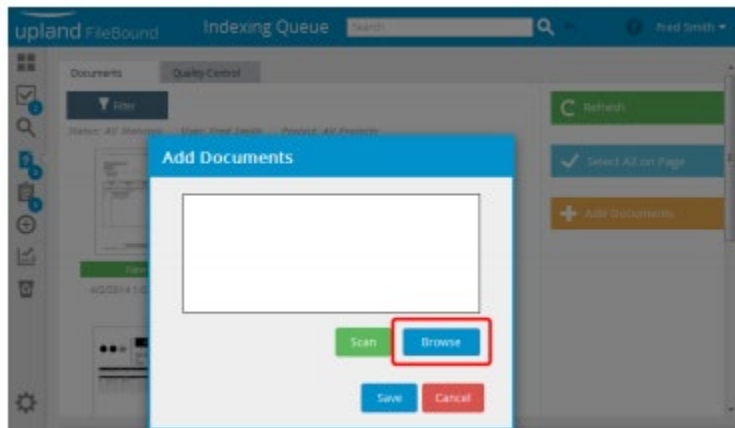
- Click Add Documents within the **Indexing Queue** page. The **Add Documents** dialog box opens.



3. Add Documents

- Click **Browse** within the **Add Documents** dialog box. The **File Upload** dialog box opens.
- Select the documents you want to add.
- Click **Open**.

Note: You can click Scan to add documents in indexing queue using a scanning device.



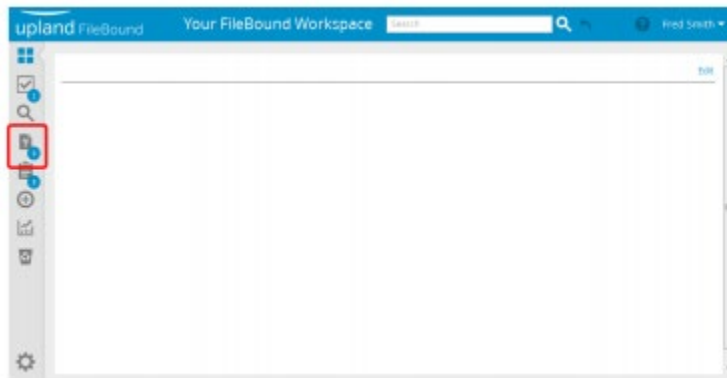
What documents can I see in the Indexing Queue?

The **Indexing Queue** provides an area for uploaded documents that have not been indexed or associated with an existing file to be temporarily stored until indexing is completed. This is useful when multi-function copiers and other similar scanning devices are used to digitize the document that do not have any method to index the document. The document enters in the **Indexing Queue** when the user knows the project that the documents will be added to, but does not have indexing information. The project is assigned during scanning or importing documents. Documents that are uploaded to FileBound and are not associated with any project also enter the **Indexing Queue**. The documents in the **Indexing Queue** are filtered based on the project they are associated to, their status, and the user who uploaded the documents. Documents uploaded by all users is visible to a user if the **Global Indexing User** is not configured. A user can see the document is uploaded by themselves and the **Global Indexing User**, if the **Global Indexing User** is configured by System Administrator.

How do I select all documents in the Indexing Queue?

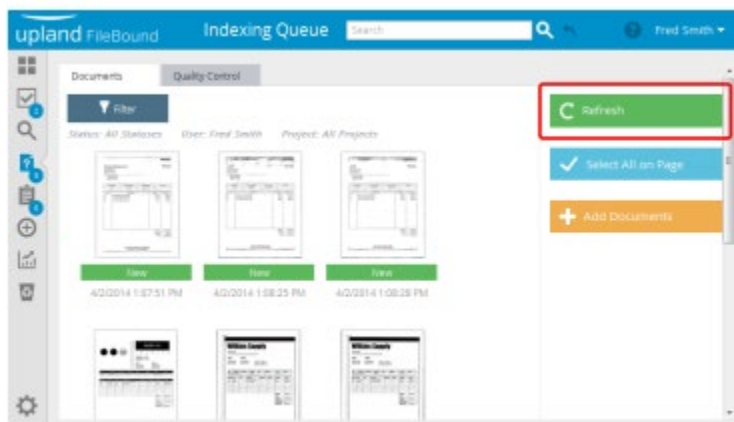
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.



2. Select all Documents

- Click **Select All** on Page, to select all documents within the **Indexing Queue** page.



How do I select a document to index in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

How do I select multiple documents within the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select Multiple Documents

- Press the **Ctrl** key, and then click the documents you want to select



How do I deselect a document in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Deselect a Document

- Click the selected document to deselect that document.



How do I filter the list of documents in the Indexing Queue based on status?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Filter the List of Documents

1. From the **Filter** menu, select **By Status**.

The following options are available:

All Statuses: The documents with any status are displayed within the indexing queue.

New: The documents that are uploaded or scanned into the indexing queue are displayed.

Queued: The documents that have been queued for an operation by an automation process are displayed.

Processing: The documents that are being processed by an automation process are displayed.

Queued Error: The documents that could not be properly processed by an automation process are displayed. These documents need to be indexed manually.

OCR Error: The documents that could not be properly **OCR'd** during an automation process are displayed. These documents need to be indexed manually

Template Match Error: The documents that could not be matched to a template during an automation process are displayed. These documents need to be indexed manually.

Manual Indexing: The documents that have been opened within the Indexing Queue indexing window are displayed. Documents opened within the **Indexing Queue** indexing window for manual indexing will not be queued to be handled by an automation process.

2. Select a status to display the documents with that status.

Note: Next to each status, the number of documents with that status are displayed within parenthesis.

How do I filter the list of documents in the Indexing Queue based on the user that uploaded the document?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Filter the List of Documents

1. From the **Filter** menu, select **By User**.

The following options are available:

- **All Users:** The documents uploaded by any user are displayed within the indexing queue.

- **User Name:** The name of all FileBound users with access to the indexing queue are displayed.
2. Select a user name to display the documents uploaded by that user.

Note: Next to each user name, the number of documents that are uploaded by that user are displayed within parenthesis.



How do I filter the list of documents in the Indexing Queue based on the project that they are associated with?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Filter the List of Documents

1. From the **Filter menu**, select **By Project**.

The following options are available:

- **All Projects:** The documents located with any project are displayed within the indexing queue.
 - **Global:** The documents that are not associated with any project are displayed within the indexing queue.
 - **Project Name:** The documents associated with the selected project are displayed within the indexing queue.
2. Select a project to display the documents associated with that project.

Note: Next to each project, the number of documents associated with that project are displayed within parenthesis.



How do I delete a document from the Indexing Queue?

1. Open the Indexing Queue Page

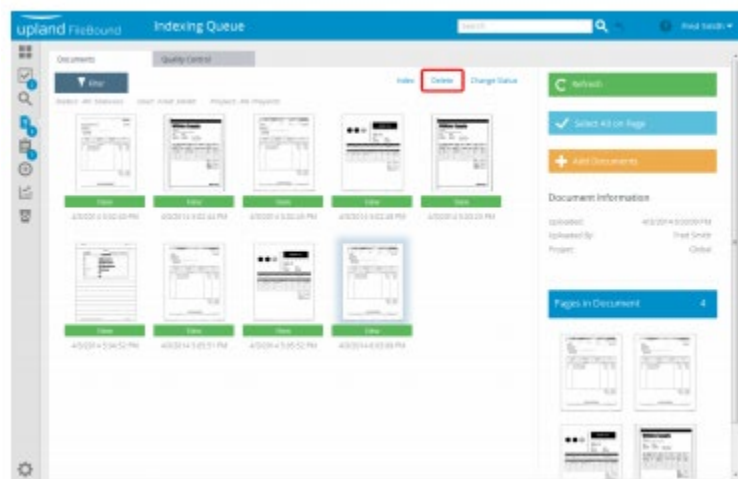
- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page

3. Delete the Document

- Click **Delete** on the top-right of the **Indexing Queue** page. The selected document is deleted after confirmation



How do I change the status of a document in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens

2. Select a Document

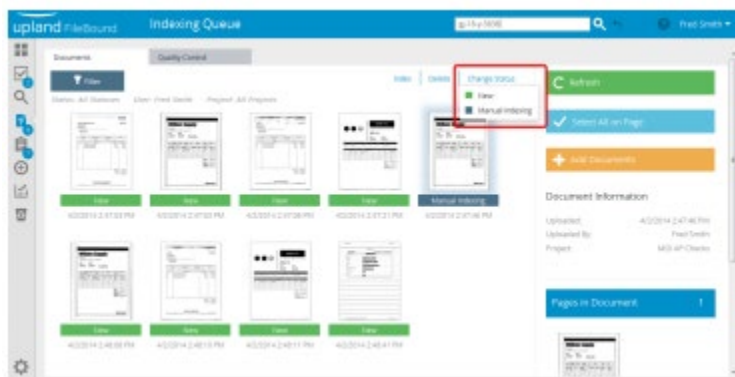
- Click the document to select that document within the **Indexing Queue** page.

3. Change the Status

- Click **Change Status**, and then select an option from the list.

The following options are available:

- New:** The documents that are uploaded or scanned into the indexing queue are displayed.
- Manual:** The documents that have been opened within the Indexing Queue indexing window are displayed. Documents opened within the Indexing Queue indexing window for manual indexing will not be queued to be handled by an automation process.



What are the different statuses for documents in the Indexing Queue?

Status:

New: The documents that are uploaded or scanned into the indexing queue are displayed.

Queued: The documents that have been queued for an operation by an automation process are displayed. Processing: The documents that are being processed by an automation process are displayed.

Queued Error: The documents that could not be properly processed by an automation process are displayed. These documents need to be indexed manually.

OCR Error: The documents that could not be properly OCR'd during an automation process are displayed. These documents need to be indexed manually.

Template Match Error: The documents that could not be matched to a template during an automation process are displayed. These documents need to be indexed manually.

Manual Indexing: The documents that have been opened within the Indexing Queue indexing window are displayed. Documents opened within the Indexing Queue indexing window for manual indexing will not be queued to be handled by an automation process.

How do I combine documents in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Combine the Documents

- Click the document you want to combine, and then drag the document over the **Document Information** section. The dragged document is now combined with the selected document.



How do I split a page from a document to a new file in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Split a Page

- Click the thumbnail image of the page you want to split within the **Document Information** section.
- Drag the image within the empty space in the **Indexing Queue** page. The page is removed from the document and a new file is created within the **Indexing Queue**.



How do I move a page from one document to another document in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Move a Page

- Click the thumbnail image of the page you want to move within the **Document Information** section.
- Drag the image over another document in the **Indexing Queue** page.



How do I delete a page from a document?

FileBound does not allow you to delete a page from a document. However, you can split a page to create a new file within the **Indexing Queue**, and then delete that file.

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Split a Page

- Click the thumbnail image of the page you want to split within the **Document Information** section.
- Drag the image to the empty space in the **Indexing Queue** page.

The page is removed from the document and a new file is created in the **Indexing Queue**.

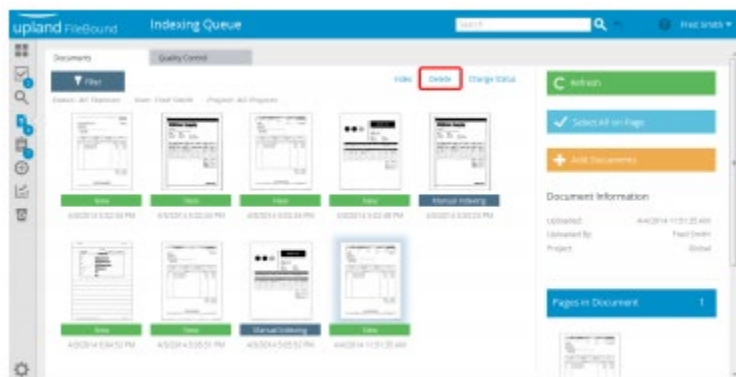
4. Select the Document

- Click the newly created document, to select that document within the **Indexing Queue** page.

5. Delete the Document

- Click **Delete** on the top-right of the **Indexing Queue** page.

The selected document is deleted after confirmation.



How do I index a document in the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.

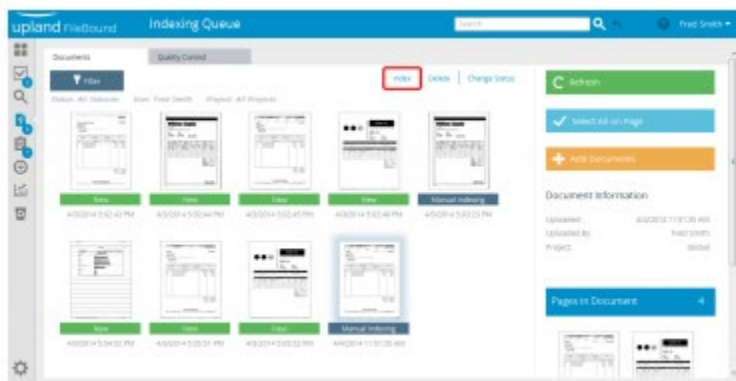
The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

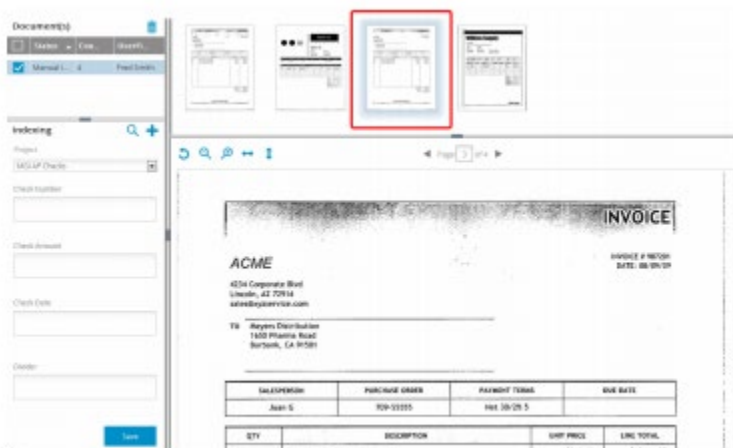
3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page.
The indexing queue viewer opens.



4. Select a Page

- Select the page to be indexed.



5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.

The screenshot shows the FileBound application interface. On the left, the 'Indexing' pane is visible with a red box highlighting the 'Project' field, which contains the value '100 AP Check'. The main area displays a preview of an invoice from ACME. The invoice includes the company name, address, and a table with the following data:

SALESPERSON	PURCHASE ORDER	PAYMENT TERMS	DUPLICATE
Juan G	709-55555	Net 30/25.5	

Below this table is another table with columns: QTY, DESCRIPTION, UNIT PRICE, and LINE TOTAL.

6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.

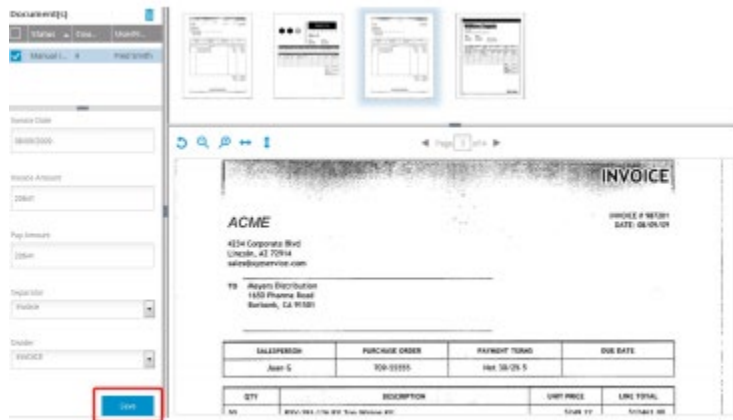
This screenshot shows the 'Indexing' pane with several fields filled out, highlighted by a red box. The fields and their values are:

- Project: 100 AP Check
- Invoice Number: 98765
- Department: Administration
- PO Number: 709-55555
- Vendor: ACME
- Invoice Date: 08/08/2008
- Invoice Total: 08/08/2008

The main area continues to show the invoice preview from ACME.

7. Click Save

- Click the **Save** icon within the **Indexing** pane.
The new file will now be saved and the selected pages will be associated with that file and removed from the **Indexing Queue**.



How do I index multiple documents to the same file and the same divider at the same time within the Indexing Queue?

1. Open the Indexing Queue Page

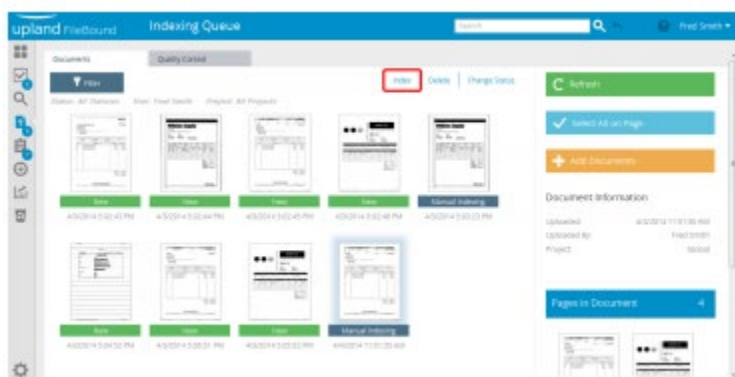
- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select Multiple Documents

- Press the **Ctrl** key, and then click the documents you want to select.

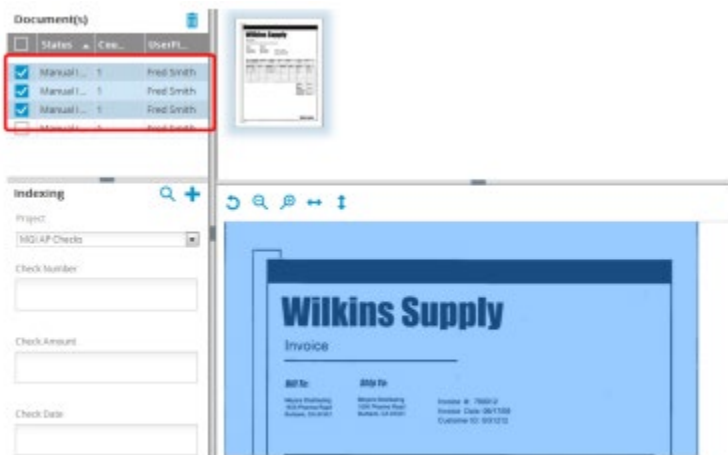
3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page. The indexing queue viewer opens.



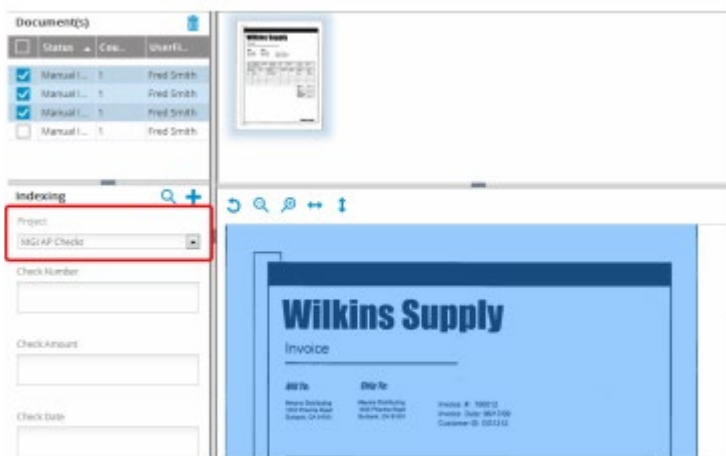
4. Select Multiple Document

- Select the check boxes adjacent to the documents within the **Document** pane.



5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.

- Click the **Save** icon within the **Indexing** pane. The **Document Properties** dialog box opens.

Document(s)

Status Case User...

☒ Manual L... 1 Fred Smith

☒ Manual L... 1 Fred Smith

☒ Manual L... 1 Fred Smith

☐ Manual L... 1 Fred Smith

Bill Entry
10/10/2005

Invoice Date
06/17/2006

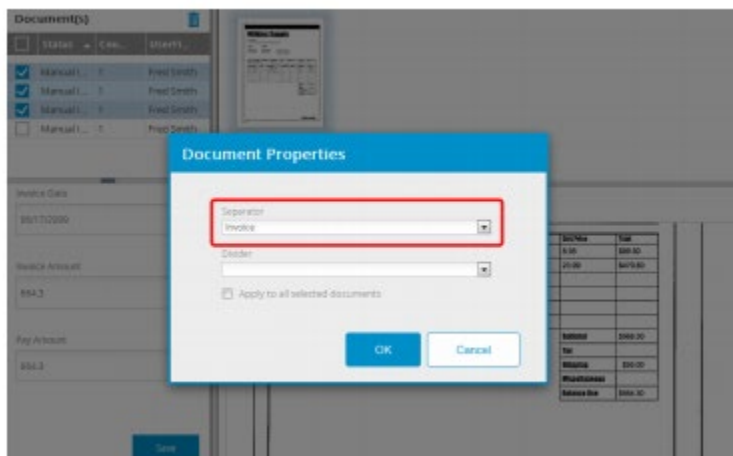
Invoice Amount
664.3

Pay Amount
664.3

Save

8. Select a Separator

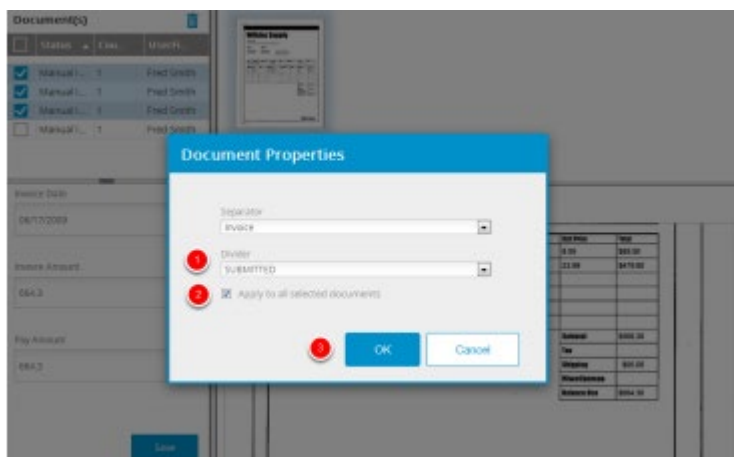
- You can select a separator from the **Separator** list.



9. Select a Divider

1. Select a divider from the **Divider** list.
2. Select the **Apply** to all selected documents check box, to index the files to the same separator and divider.
3. Click **OK** to complete the operation.

The documents selected in the **Document** pane are indexed to the same file within the same separator and divider.



How do I index multiple documents to the same file but different dividers within the Indexing Queue?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select Multiple Documents

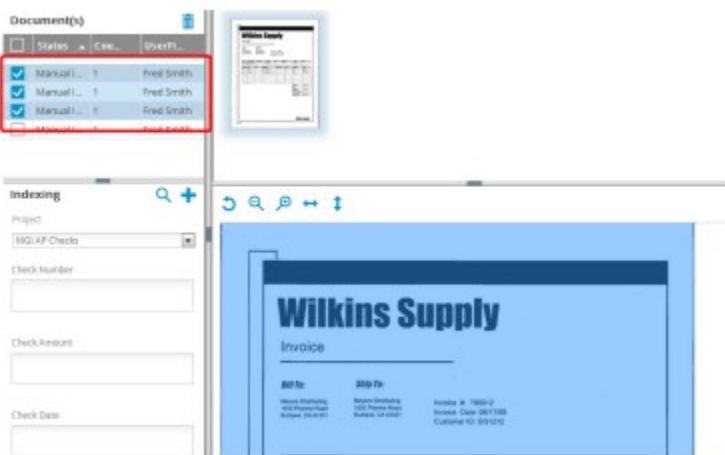
- Press the **Ctrl** key, and then click the documents you want to select.

3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page.
The indexing queue viewer opens.

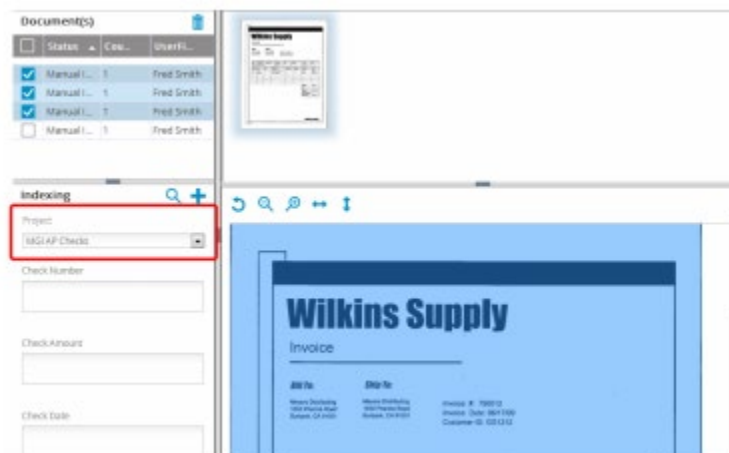
4. Select Multiple Document

- Select the check boxes adjacent to the documents within the **Document** pane.



5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.

[illegible]

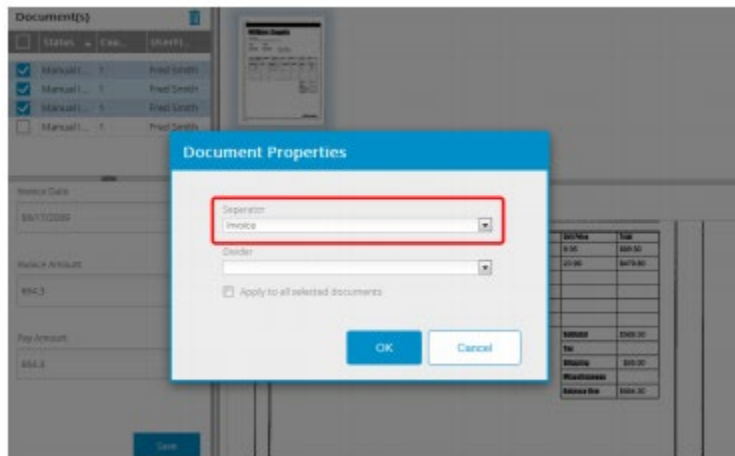
7. Click Save

- Click the **Save** icon within the **Indexing** pane. The **Document Properties** dialog box opens.

The screenshot shows the 'Document(s)' window. On the left, there is a list of documents with columns for 'Status', 'Date', and 'User'. The first three documents are 'Manual L...' with a status of '1' and user 'Fred Smith'. The fourth document is 'Manual L...' with a status of '1' and user 'Fred Smith'. On the right, there is a preview of a document titled 'Document(s)' with a date of '10/10/2010'. Below the preview, there is a table with columns: 'Serial', 'Date', 'Title', 'Description', 'User', 'Status', 'Date', 'Total', and 'Total'. The table contains two rows of data. The first row has '10', '10/10/2010', 'Contractor - Class', 'User', 'Status', '10/10/2010', and 'Total'. The second row has '10', '10/10/2010', 'Contractor - Class', 'User', 'Status', '10/10/2010', and 'Total'. At the bottom of the window, there is a 'Save' button highlighted with a red box.

8. Select a Separator

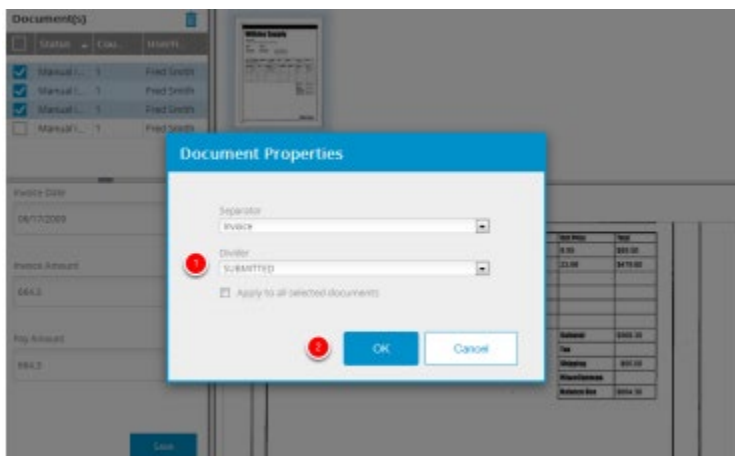
- You can select a separator from the **Separator** list.



9. Select a Divider

1. Select a divider from the **Divider** list.
2. Click **OK** to complete the operation.

The **Document Properties** dialog box opens again.



The **Document Properties** dialog box will open repeatedly to allow you to select different separator and divider for each document you have selected in the **Document** pane.

How do I add a document in the Indexing Queue to an existing file?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

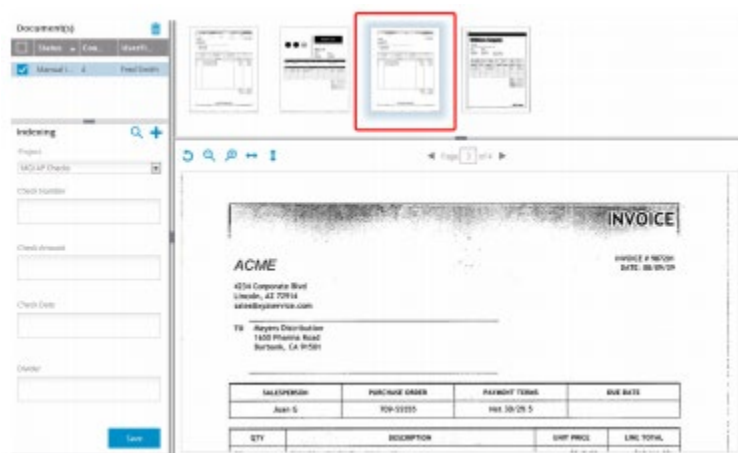
- Click the document to select that document within the **Indexing Queue** page.

3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page.
The indexing queue viewer opens.

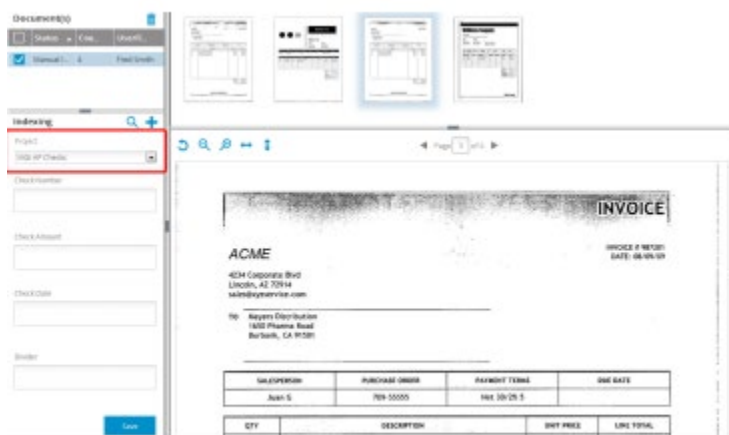
4. Select a Page

- Select the page to be indexed.



5. Select a Project

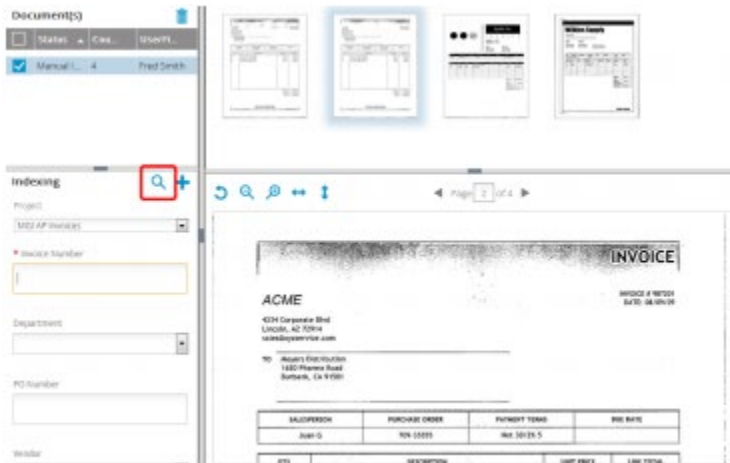
- Select a project from the **Project** list within the **Indexing** pane.



6. Open the Search Dialog Box

- Click the file search icon on the top right side of the **Indexing** pane.

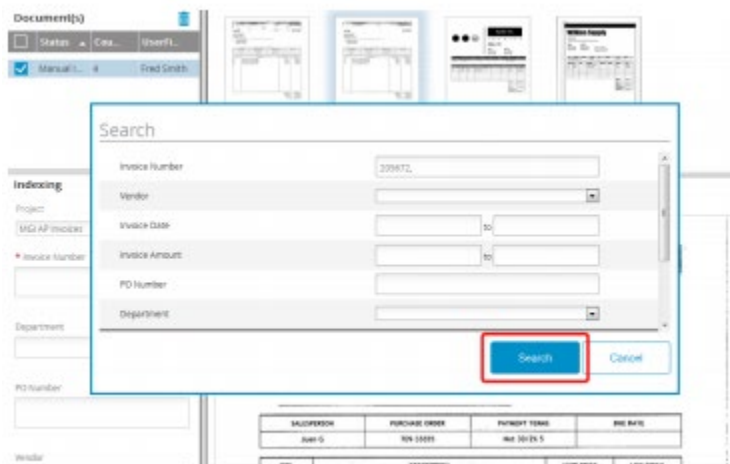
The **Search** dialog box opens.



7. Type the Search Criteria

- Type a search criteria to find the file, and then click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.



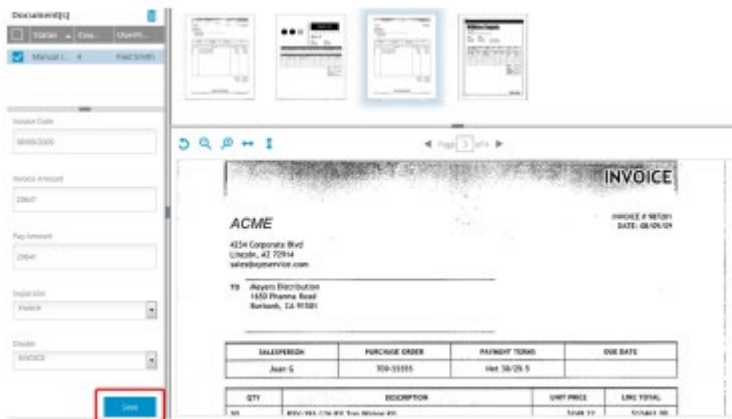
8. Select a File

- If multiple results are returned, click the appropriate file. The index fields are populated based on the file selected.



9. Click Save

- Click the **Save** icon within the **Indexing** pane.



How do I display document pages in the Indexing Queue indexing window?

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Open the Indexing Queue Viewer

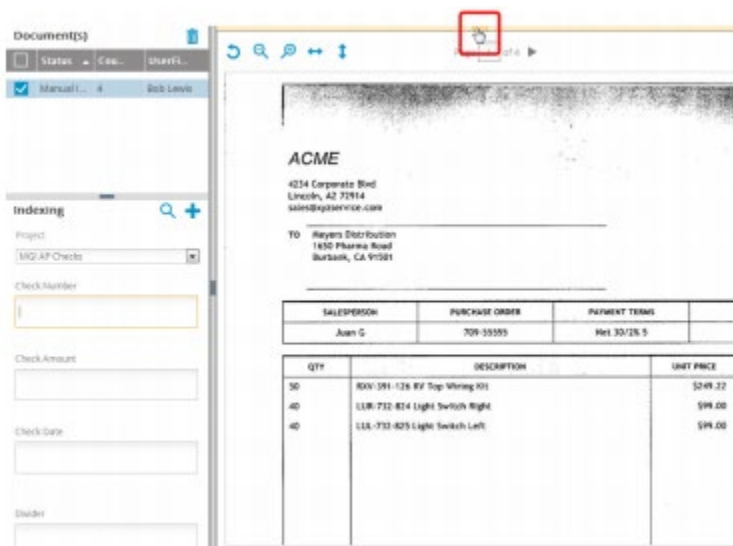
- Click Index on the top right side of the **Indexing Queue** page.

The indexing queue viewer opens.

4. Click the Side Bar

- Click the slide bar on top of the **Content** pane, to display the document pages in the **Indexing Queue** indexing window.

The document's pages are displayed within the **Page** pane.



How do I point and click index a document within the Indexing Queue?

You can use the mouse to point and select values on a scanned page to use that values to be used for index values. This allows you to quickly index files and prevent you from keying incorrect index information.

Note: The document need to have **OCR** performed to be able to use point and click index feature.

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Select the Index Field

- Click the index field within the **Indexing** pane, to select the index field to be indexed.

The screenshot shows the FileBound application interface. On the left, the 'Indexing' section has a red box around the 'Invoice Number' field. The main window displays an 'INVOICE' for 'MGI Sporting Goods'. The invoice includes the company name, address (1721 Mission Lane, Hillsdale, OH 44868), phone/fax numbers, and invoice details (Invoice # 20145, Account # 86791420). A table at the bottom is titled 'Line Item Indexing' with columns for Stock Number, Description, PO Number, Vendor, Invoice Date, Invoice Amount, and Pay Amount.

4. Select the Index Value

Move the mouse pointer over the word or value, found on the scanned page to be used for the index field. The word will be highlighted with a green highlight, when FileBound recognizes the word or value.

Note: Holding down the left mouse button and drawing a rectangle over multiple words, will build a string of words that will be placed in the selected index field, when the mouse button is released.

This screenshot is similar to the previous one, but it shows a green highlight on the word 'Invoice' within the invoice document. A red rectangle is still around the 'Invoice Number' field in the left sidebar, indicating the selection process.

What is Quality Control?

Quality Control provides users an area to review content that has been added and indexed within the **Indexing** queue. This allows users to review the indexing that was applied during an **Auto-Index** template automation process. Users are able to verify the data, which will add the file to the system so it can be found in a search. Users are also able to reject the file and send it back into the **Indexing Queue**. Users are able to fix and add index values within the **Quality Control** area as well.

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

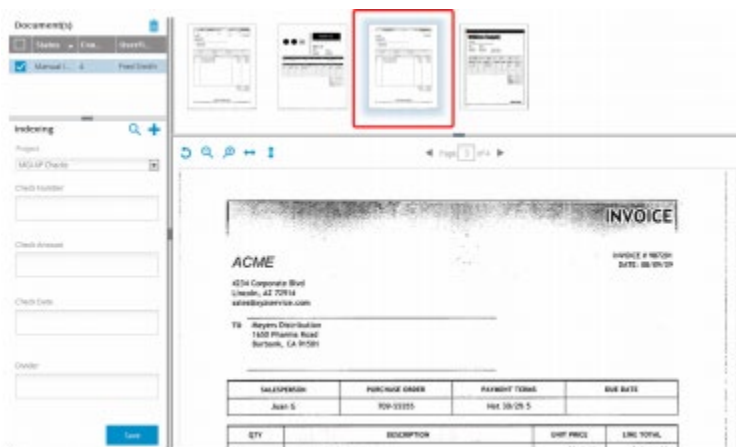
- Click the document to select that document within the **Indexing Queue** page.

3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page. The indexing queue viewer opens.

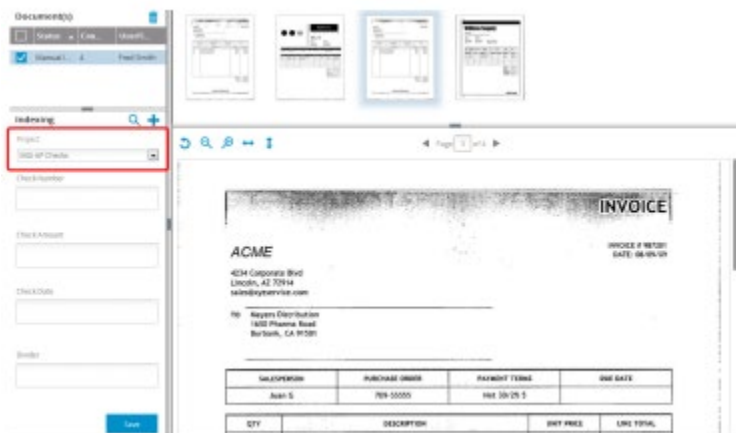
4. Select a Page

- Select the page to be indexed.



5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.

The screenshot displays the Oracle Primavera P6 'Invoice' form. The interface includes a top navigation bar with tabs like 'Project', 'Procurement', and 'Reports'. Below this is a toolbar with various icons for navigation and editing. The main form area is split into two panes. The left pane contains a sidebar with the following fields:

- Invoice Number:** A text field containing 'IN720'.
- Equipment:** A dropdown menu with 'Administration' selected.
- PO Number:** A text field containing '709-00001'.
- Vendor:** A dropdown menu with 'ACME' selected.
- Invoice Date:** A text field containing '2009-03-01'.

The right pane displays the invoice details. At the top, there is a header section with the word 'INVOICE' in large, bold letters. Below this, the 'ACME' logo is shown. The address '4214 Corporate Blvd, Lincoln, NJ 07036' and website 'sales@primservice.com' are listed. The invoice is dated '08-01-09' and is for 'Invoice # IN720'. The 'TO' field is filled with 'Museum Institution, 1650 Phoenix Road, Berkeley, CA 94709'. At the bottom, there is a table with the following structure:

SALESPERSON	PURCHASE ORDER	PAYMENT TERM	USE DATE
Joan C	709-0000	Net 30/25.5	

Below this table, there is another table with columns for 'QTY', 'DESCRIPTION', 'UNIT PRICE', and 'LINE TOTAL'.

7. Click Save

- Click the **Save** icon within the **Indexing** pane.
The new file will now enter quality control and is displayed under the **Quality Control** tab within the **Indexing Queue** page.

The screenshot shows the Document Manager interface. On the left, there is a sidebar with a search bar, a list of documents, and a 'Save' button highlighted with a red box. The main area displays a preview of an invoice document. The invoice is from ACME, dated 08/08/2019, and includes a table with columns for QTY, DESCRIPTION, UNIT PRICE, and LINE TOTAL. The 'Save' button is located at the bottom left of the sidebar.

How do I change the project in Quality Control?

Note: Quality Control is only available to the users with System Administrator rights.

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

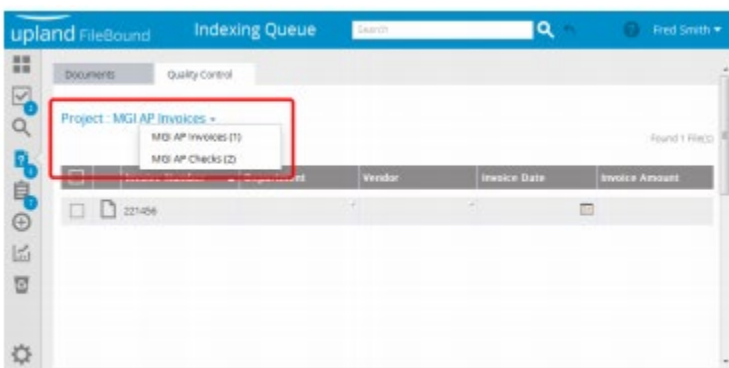
2. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
The files in quality control are displayed.



3. Change the Project

- Click **Project**, to select another project from the list.
The files associated with the selected project that are in quality control are displayed.



How can I move between index fields in Quality Control?

You can use the arrow keys on you keyboard to move between index fields within the **Quality Control** page. To be able to use the arrow keys, you need to click on a index field within the **Quality Control**.

1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.

3. Open the Indexing Queue Viewer

- Click Index on the top-right of the **Indexing Queue** page.
The indexing queue viewer opens.

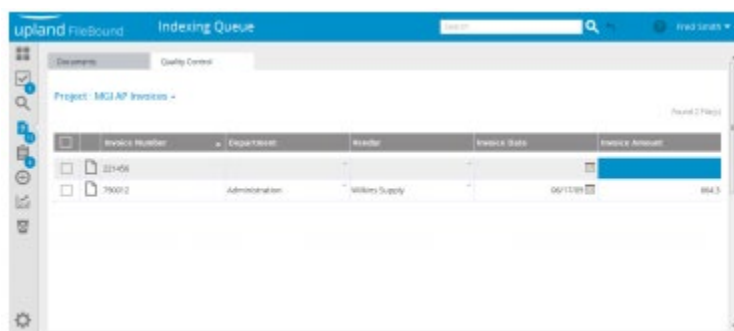
4. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
The files in quality control are displayed.



5. Click an Index Field

- Click a cell within the **Quality Control** tab. You can use the arrow keys to move between index fields.



How do I discard changes made in Quality Control?

Note: **Quality Control** is only available to the users with System Administrator rights.

1. Open the Indexing Queue Page

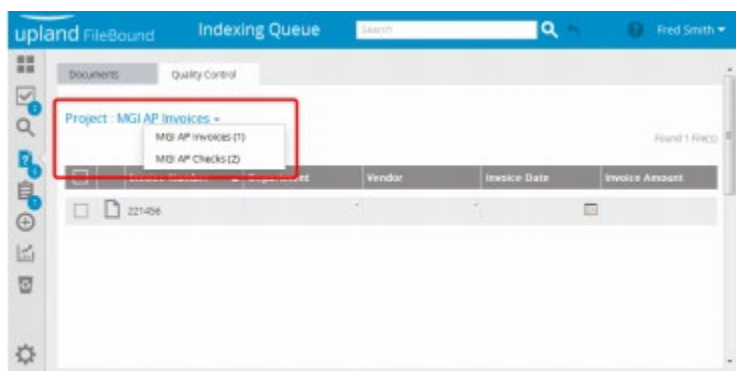
- Click the indexing queue icon on the navigation pane. The **Indexing Queue** page opens.

2. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
The files in quality control are displayed.

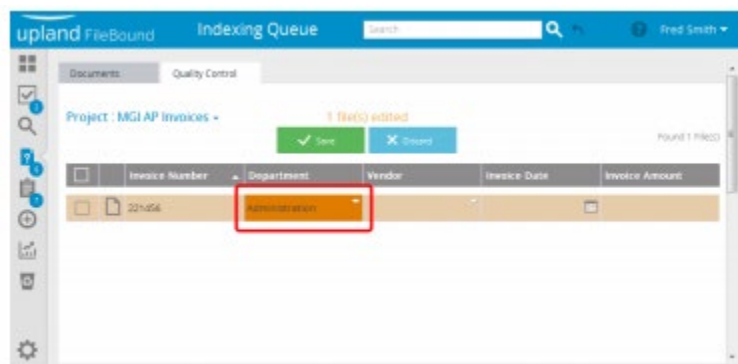
3. Select the Project

- Click **Project**, to select a project from the list.
The files associated to the selected project that are in quality control are displayed.



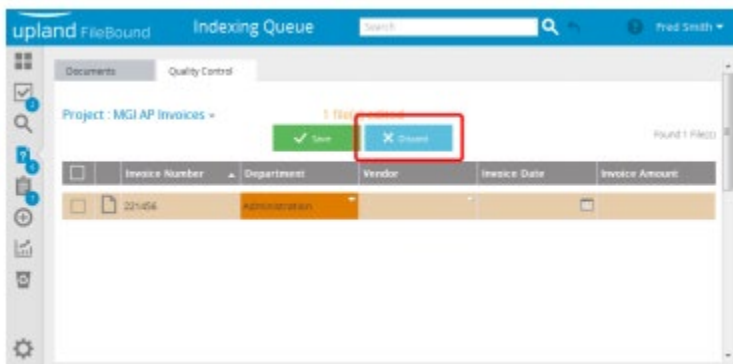
4. Edit the Index Field Values

- Click the cell containing the value you want to change.
- Type the new value in the cell.



5. Discard the Changes

- Click **Discard**, to discard the changes



Working with Files

What is the File Detail page?

File Detail Page

The **File Detail** page helps you manage files and its documents in a project. The **File Detail** page displays values of the index fields of the file, name of the user who last modified the file, and the date and time when the file was last modified.

You can perform file related operations such as adding documents to the file, viewing, editing, copying, deleting files; generating and printing barcodes; and adding file to the clipboard.

You can view workflow related information on the file, if the file is used in workflow processes. The workflow related information is organized as:

- **Current** - Displays workflow information for the file waiting on a process step for an action to be taken.
- **Overdue** - Displays workflow information for the file waiting on a process step for an action that is past its due date.
- **All** - Displays workflow information for the file in any workflow step.

The documents contained within the file are listed within the **File Detail** page. For each document, the following information is displayed:

- The number of pages contained within the document.
- The document name.
- The name of the user who added the document.
- The date and time when the document was added.
- The date and time when the document was last viewed.

Using the various tabs of the **File Detail** page, you can manage documents of a file, perform file tracking activity, add notes for the file, and manage CAR data.

The screenshot shows the 'File Detail' page in the upland FileBound application. The page title is 'Project: MGI AP Invoices'. It contains a form with the following fields and values:

- Invoice Number: 209673
- Department: Administration
- PO Number: 508-86285
- Vendor: Apollo Inc
- Invoice Date: 6/3/2008
- Invoice Amount: 74384.00
- Pay Amount: 74828
- Box Number: (blank)
- Destruction Date: (blank)
- Last Changed: 8/12/2014 1:55:30 PM
- Changed By: Fred Smith
- Workflow Activity: Current - Download - All

How do I view the File Detail page?

1. Open the Search Page

2. Select a Project

- Select a project from the **Project** list, to perform the search within that project. **Projects** are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.

The screenshot shows the 'Search' page in the upland FileBound application. The 'Project Search Criteria' section is visible, with the 'Project' dropdown menu highlighted by a red box. The selected project is 'MGI AP Invoices'. Other search criteria fields include Invoice Number, Department, PO Number, Vendor, Invoice Date, Invoice Amount, Divider, and Separator. The 'Advanced Search Options' section is expanded at the bottom, showing additional search criteria.

3. Specify the Search Criteria

- Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note:** You can click **Advanced Search Options** to specify more search criteria.

2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens. **Note:** The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open File Detail Page

- Click the file detail icon adjacent to a file on the **Search Results** page. The **File Detail** page for that file opens.

	Invoice Number	Invoice Date	Vendor	Department	Invoice Amount	File Change Date
<input checked="" type="checkbox"/>	13096	11/15/13	Wilkins Supply	Administration	2900	3/23/2014
<input type="checkbox"/>	209470					4/2/2014
<input type="checkbox"/>	209472	09/03/13	Apollo Inc.	Administration	74340	7/28/2014
<input type="checkbox"/>	209472	12/19/13	Apollo Inc.	Administration	5623	3/25/2014
<input type="checkbox"/>	23658	10/13/13	ACH2E	IT	7580	3/23/2014
<input type="checkbox"/>	294413	03/18/13	ABC Company	Administration	3569	3/23/2014
<input type="checkbox"/>	47522	05/11/13	Express Electronic...	IT	13230	3/23/2014
<input type="checkbox"/>	47522	06/18/13	ABC Company	Sales	5088	3/23/2014
<input type="checkbox"/>	475289	06/05/13	Apollo Inc.	Administration	4589	3/23/2014
<input type="checkbox"/>	45896	03/18/13	Wilkins Supply	Sales	5485	3/23/2014
<input type="checkbox"/>	48359	06/03/13	Express Electronic...	IT	80000	3/23/2014

How do I view a document from the File Detail page?

1. Open the Search Page

2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

5. View a Document

1. You can expand separators and dividers that contains the document.

Version Note: The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.

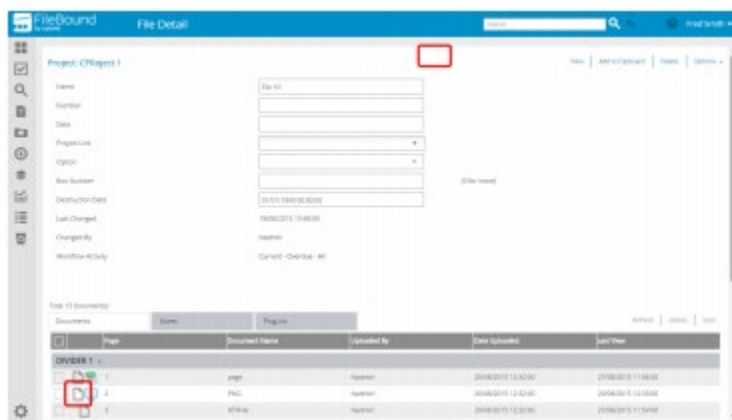
2. Click the view icon adjacent to a document.

Or,

Select the check box adjacent to a file, and then click **View**.

The selected document opens in the default viewer. **Note:** You can select check box adjacent to more than one documents, to view multiple document in the **Viewer**.

Note: If the document is locked by another user, a prompt is displayed within the **Viewer** mentioning the name of the user that has locked the document.



How do I scan documents into a file from the File Details page?

1. Open the Search Page

2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

5. Open the Scanning Viewer

Click **Scan**.

The **Scanning Viewer** window opens.

The screenshot shows the 'upland FileBound File Detail' interface. The top navigation bar includes a search bar and a user profile for 'Fred Smith'. The main content area is titled 'Project: MGIAP Invoices' and contains a form with the following fields:

- Invoice Number: 285672
- Department: Administration
- PO Number: 730-90389
- Vendor: Agallo Inc.
- Invoice Date: 9/3/2009
- Invoice Amount: 14046.30
- Pay Amount: 14046.30
- Doc Number: (blank)
- Destruction Date: (blank)
- Last Changed: 10/8/2014 1:53:08 PM
- Changed By: Fred Smith
- Workflow Activity: Current - Overview - All

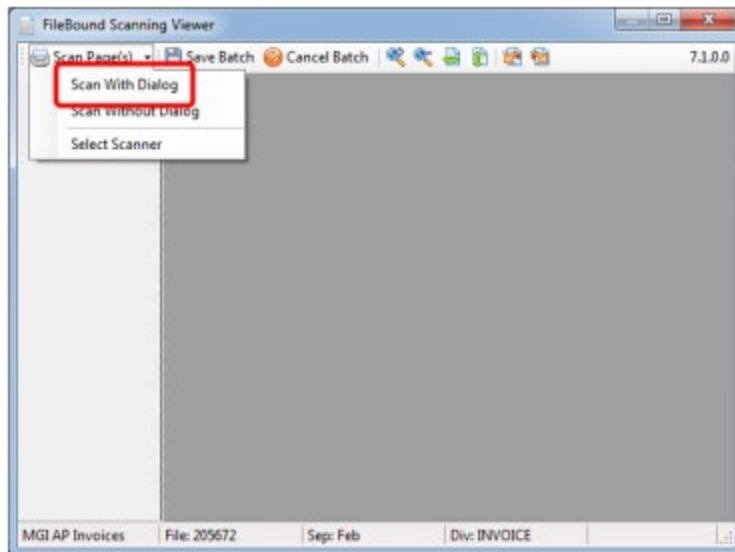
Below the form, there is a section for 'Total: 4 Documents' with tabs for 'Documents', 'Notes', and 'Tracking'. The 'Documents' tab is active, showing a table with the following data:

Page	Document Name	Uploaded By	Date Uploaded	Last View
1	Page 0001	Fred	3/19/2014 1:08:07 PM	8/5/2014 2:25:08 PM
2	Page 0002	Fred	3/19/2014 1:08:57 PM	8/5/2014 2:25:08 PM
3	Page 0003	Fred	3/11/2014 10:32:57 AM	8/5/2014 2:25:08 PM
4	Page 0004	Fred	3/11/2014 10:32:58 AM	8/5/2014 2:25:08 PM

The 'Scan' button is highlighted with a red box in the bottom right corner of the interface.

6. Select Scan With Dialog Option

1. Select the **Scan With Dialog** option from the **Scan Page(s)** menu. The dialog for setting configurations of the scanner opens.
2. Make required changes to the scanner settings in the scanner settings dialog.
3. Click **OK** to scan pages.



How do I delete documents within the File Detail page?

1. Open the Search Page

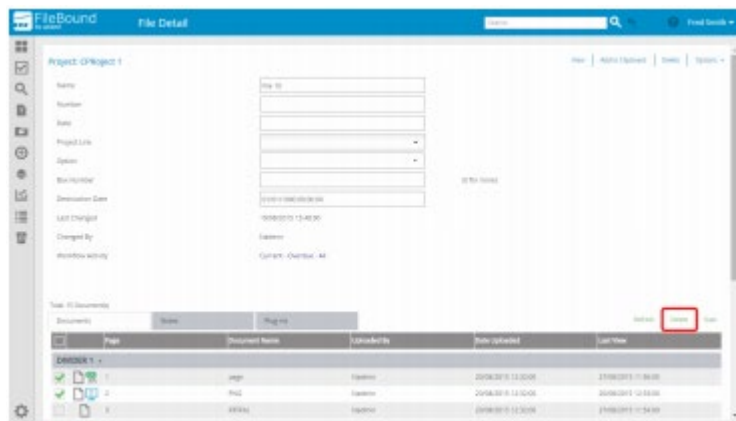
2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

5. Delete Documents

1. You can expand separators and dividers that contains the document. Version **Note:** The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.
2. Select the check boxes adjacent to the documents you want to delete.
3. Click **Delete**. The documents are deleted after confirmation.



How do I add a file to the clipboard from the File Detail page?

FileBound allows you to add files to your clipboard. Files added in the clipboard are simply pointers to the original file. Hence, one file can be in the clipboard of more than one user.

1. Open the Search Page

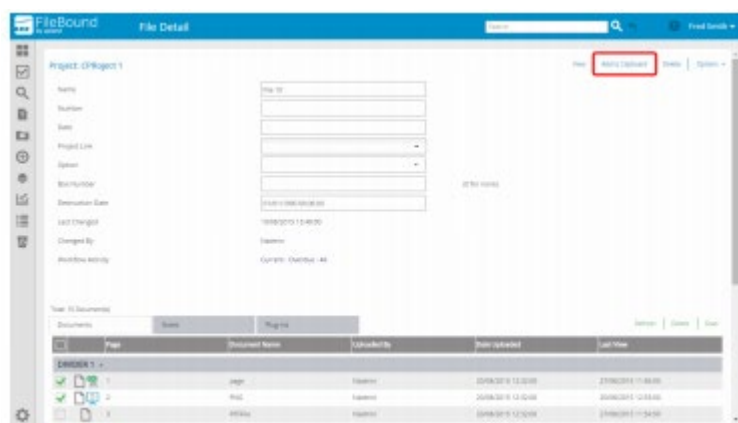
2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

5. Add File to the Clipboard

1. You can expand separators and dividers that contains the document. Version **Note:** The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.
2. Select the check box adjacent to the documents you want to add to the clipboard.
3. Click **Add to Clipboard**, to add the file to your clipboard.



How do I delete a file within the File Detail page?

1. Open the Search Page

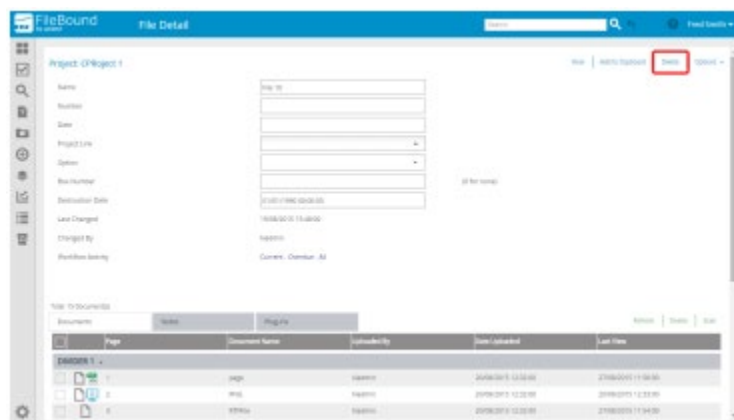
2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

5. Delete the File

- Click Delete on the toolbar. The file and all its associated documents are deleted after confirmation.



How do I add a file to another user's clipboard?

You can add a file to the clipboard of another user.

1. Open the Search Page

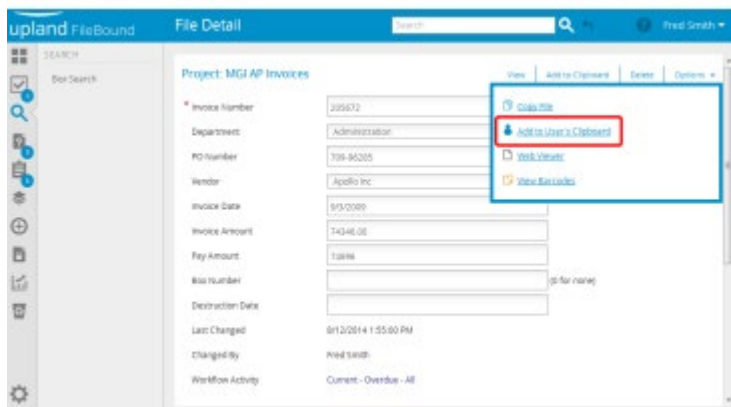
2. Select a Project

3. Specify the Search Criteria

4. Open File Detail Page

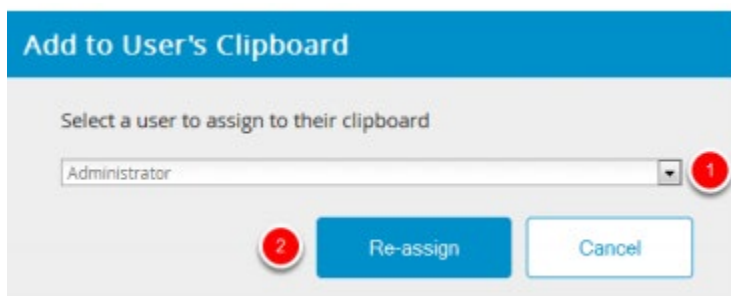
5.5. Open Add to User's Clipboard Dialog Box

- Click **Add to User's Clipboard** from the **Options** menu within the **File Detail** page. The **Add to User's Clipboard** dialog box opens.



6. Select a User

1. Select a user from the **Select** a user to assign to their clipboard list.
2. Click **Re-assign**.



How do I edit a file within the File Detail page?

You can edit the values of the index fields for the file displayed within the **File Detail** page. This lesson shows you how to edit a file within the **File Detail** page.

1. **Open the Search Page**
2. **Select a Project**
3. **Specify the Search Criteria**
4. **Open File Detail Page**
5. **Edit the Index Field Values**
 - Type the new value of an index field in the relevant box.
Or,
Select an option from the list. The **Save** button appears after you edit value of an index field.

The screenshot shows the 'File Detail' page for 'Project: MGI AP Invoices'. A red rectangular box highlights the following form fields:

- Invoice Number: 201472
- Department: Administration
- PO Number: 799-04285
- Vendor: Apollo Inc.
- Invoice Date: 9/30/2014
- Invoice Amount: 74360.00
- Pay Amount: 74360
- Box Number: (go for name)
- Destruction Date: (empty)

Below the form, the 'Last Changed' date is 8/12/2014 1:55:08 PM, 'Changed By' is Fred Smith, and 'Workflow Activity' is Current - Overdue - All.

6. Save the Changes

- Click **Save**, to save the changes.

This screenshot is identical to the previous one, but with a red rectangular box highlighting the green 'Save' button located at the top right of the form area.

Working with Assignments

What are Global Assignments?

Global Assignments is a list of documents that are assigned to a user in all workflow processes that the user works. These documents are assigned to you and waiting for you to take an action.

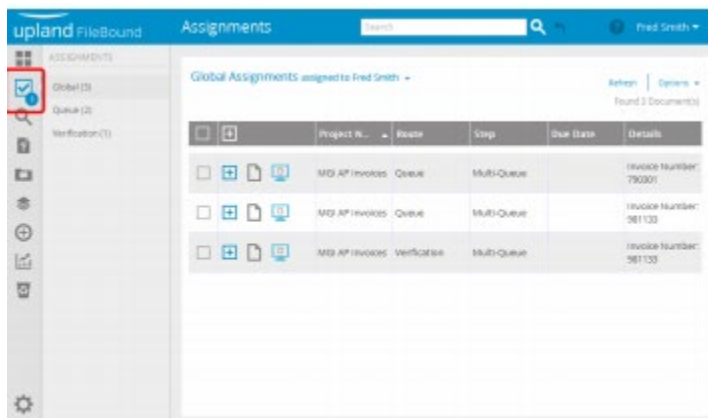
Note: If the **Start Screen** is set to the **Global Assignments** page from the **User Preference** configuration then the **Global Assignments** page opens, when you log on to FileBound.

How can I see assignments for a specific process?

You can open the **Global Assignments** page from the **Navigation** panel.

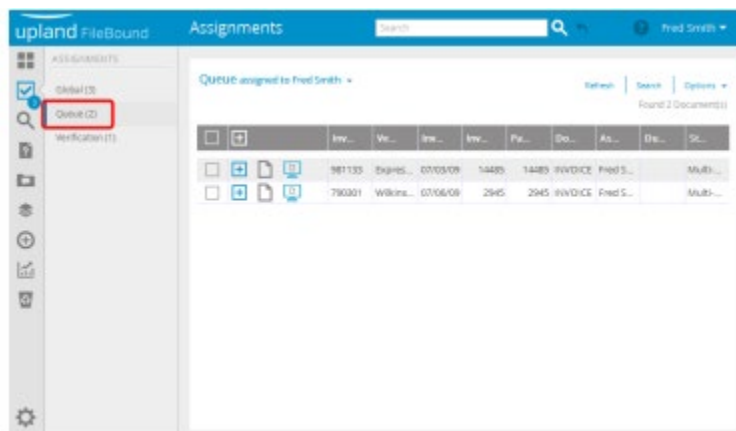
1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens displaying the **Global** assignments



2. Click a Process

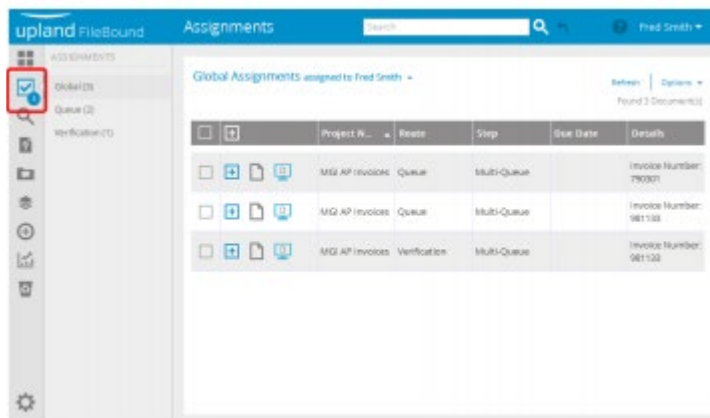
- Click the process for which you want to view assignments. Assignments for the selected process are displayed.



How do I view my Global Assignments?

Open the **Assignments** Page

- Click the assignments icon on the navigation pane. The Assignments page opens displaying the Global assignments.



How do I take action on an assignment?

You can take an action on a document assigned to you directly from the Assignments page.

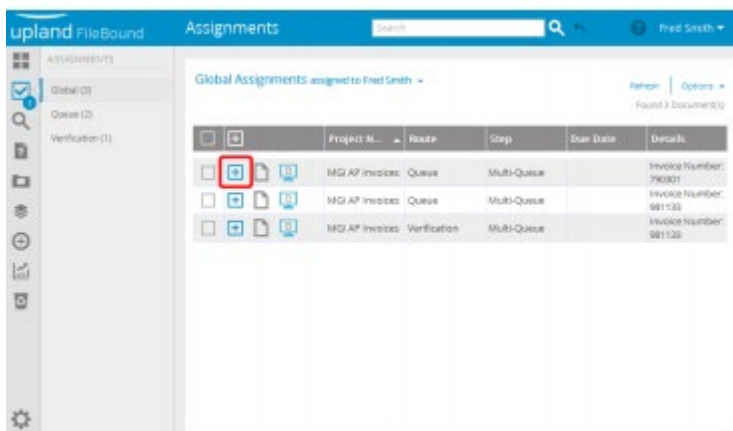
1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens displaying the **Global** assignments.

2. Expand an Assignment

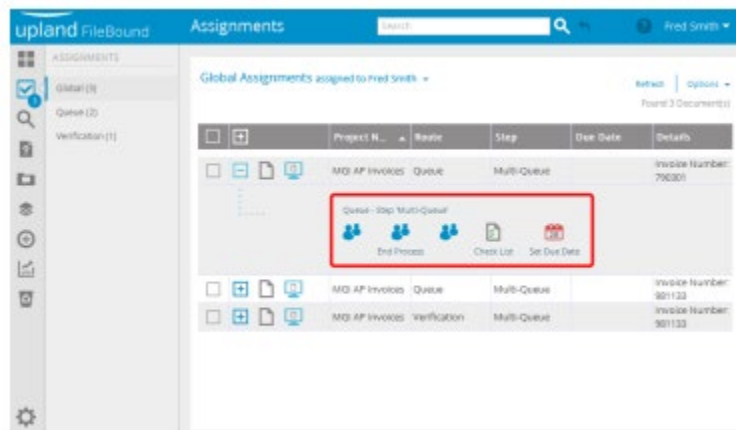
- Click the plus sign adjacent to an assigned document to display the task buttons associated with that assigned document.

Note: You might see different task buttons according to the configuration of the workflow process.



3. Take an Action

- Click a task button to take the action associated to that button



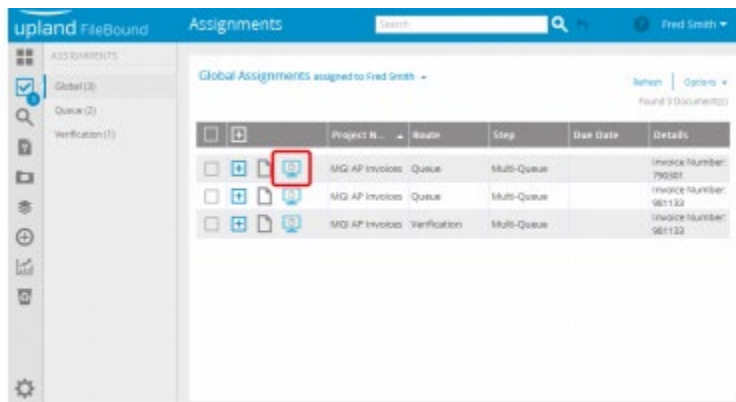
How do I preview an assignment?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens displaying the **Global** assignments.

2. Preview an Assignment

- Click the preview icon adjacent to the assignment you want to preview.



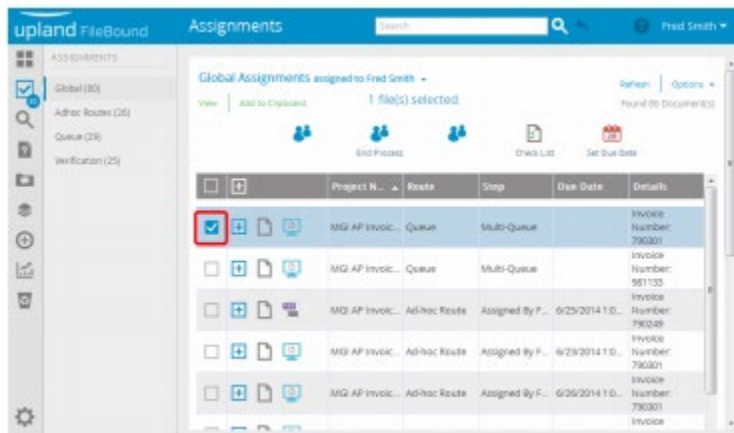
How do I view an assignment within a viewer?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens and displays the **Global** assignments.

2. Select an Assignment

- Select the check box adjacent to an assignment you want to view in the **Viewer**.



3. Open the Assignment in Viewer

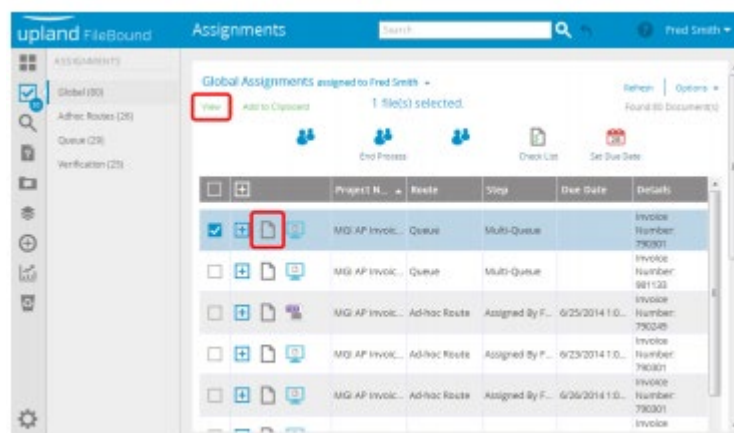
- Click the **View Document** button adjacent to the assignment, to open the assignment within a viewer.

Or,

Click **View**.

The selected file opens in the default viewer.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.



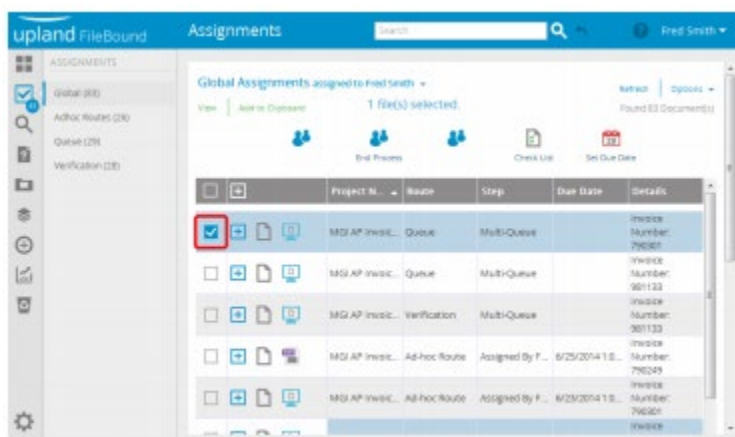
How do I add an assignment to my clipboard?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens and displays the **Global** assignments.

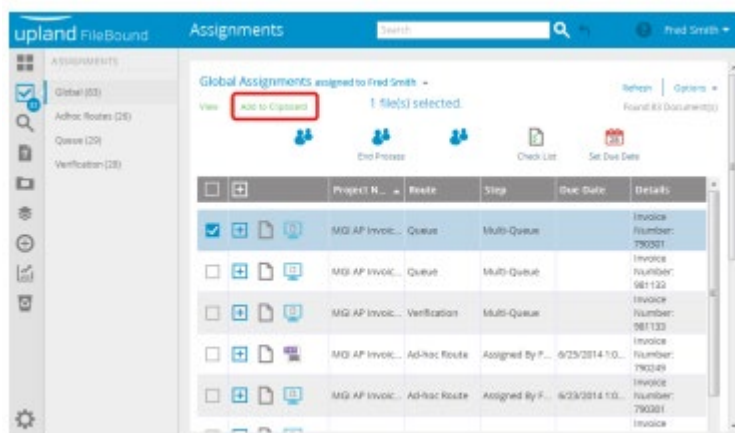
2. Select an Assignment

- Select the check box adjacent to an assignment you want to add to the Clipboard.



3. Click Add to Clipboard

- Click **Add to Clipboard**, to add the selected assignment to the **Clipboard**.



How do I see what step an assignment is on within a process?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens and displays the **Global** assignments.

2. Expand an Assignment

- Click the plus sign adjacent to an assigned document. The current step of the document is displayed above the task buttons as Queue - Step 'current step name'. For example, in the above image the current step of the document is 'Multi-Queue'.

How do I see comments that were entered before arriving on a step?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens and displays the **Global** assignments.

2. Expand an Assignment

- Click the plus sign adjacent to an assigned document. The comments are displayed above the task buttons.

How do I expand all of the task buttons for all assignments?

1. Open the Assignments Page

- Click the assignments icon on the navigation pane. The **Assignments** page opens and displays the **Global** assignments.

2. Click the Expand Button

- Click the plus sign on the column header, to expand all of the task buttons for all assignments.

Project Processes

Contact the Project Manager for your specific project with questions about processes in that project.

FileBound Projects

LIST OF FILEBOUND PROJECTS	STATUS	DESCRIPTION
Construction Cash Flow Tracking	ACTIVE	Track Cash Flow predictions of GC on Construction Projects - reporting
Construction Projects Documentation	ACTIVE	Manage Construction Process – tracking BOD actions, contracts, invoices, change orders – reporting and budgeting – automatic workflow management

Credit Card_Approval Process	ACTIVE	Manage the approval process for CC Statements – automatic workflow management
Development - Board Action Summary	ACTIVE	Track Development related Board Actions related to Construction Projects
IT Invoices	ACTIVE	Manage the approval process for IT Invoices – automatic workflow management
Scanning Projects for Paid Invoices		
SH Foundation	ACTIVE	Scanning project(s) to house Paid Invoices records for ease of access and to replace physical files
SH Partners	ACTIVE	
SH Services	ACTIVE	
SH VIP	ACTIVE	
SHSL GVT	ACTIVE	
SHSL LLV	ACTIVE	
SHSL MGMT	ACTIVE	
SHSL TC	ACTIVE	
SHSL Mgmt Filing	Last used Aug 2014	Scanning project – document management, records retrieval
SH Scanning	Last used Dec 2012	Scanning project – document management, records retrieval
Deposit Detail Reports	Last used Mar 2017	Scanning project(s) to house Deposit Detail Report records for ease of access and to replace physical files
SH Wells Fargo Credit Card Statements	Last used May 2020	Scanning project(s) to house SH Wells Fargo Credit Card Statements records for ease of access and to replace physical files
Legal Transaction Documents	Last used Oct 2018	Project proposed to manage and track organizational Legal Transaction Documents – document access and management
Refurbishment Tracking	Last used Sept 2019; project unused	Project proposed to manage and track the Unit Refurbishment Process – tracking status and document management
Sun Health Contracts Management	Set up Proposed; under Review, Dec 2021	Project proposed to manage and track organizational Contract Documents – document access and management

IT Invoices Project

The IT Invoices project was developed to replace the manual, pen-to-paper invoice processing task by creating an electronic invoices workflow project using FileBound. This effectively streamlined the approval process of IT Invoices, improved the ease of access and record retrieval, and achieved the paperless “goal” the organization has long strived to make the standard.

IT INVOICES - WORK FLOW PROCESS

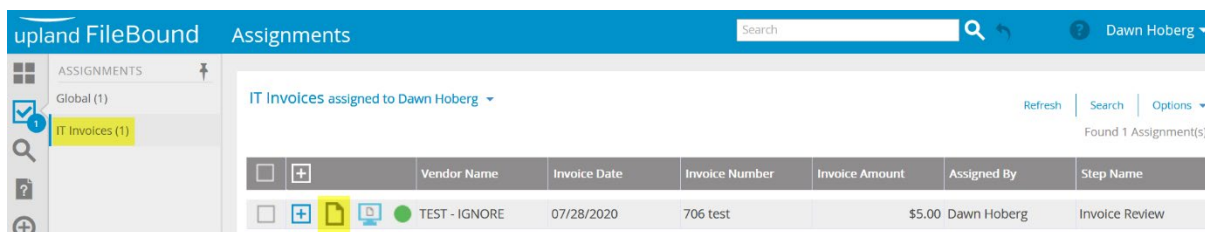
The streamlined approval process for IT Invoices uses three approval levels before it is submitted to finance for payment. The three levels of approvals are as follows:

- 1st Level Approver (Director Step)
- 2nd Level Approver (BOM Step)
- 3rd Level of Approval (EXECUTIVE DIRECTOR STEPS)
- Final step Process approved invoices are submitted to Accounts Payable for payment (Project Admin)

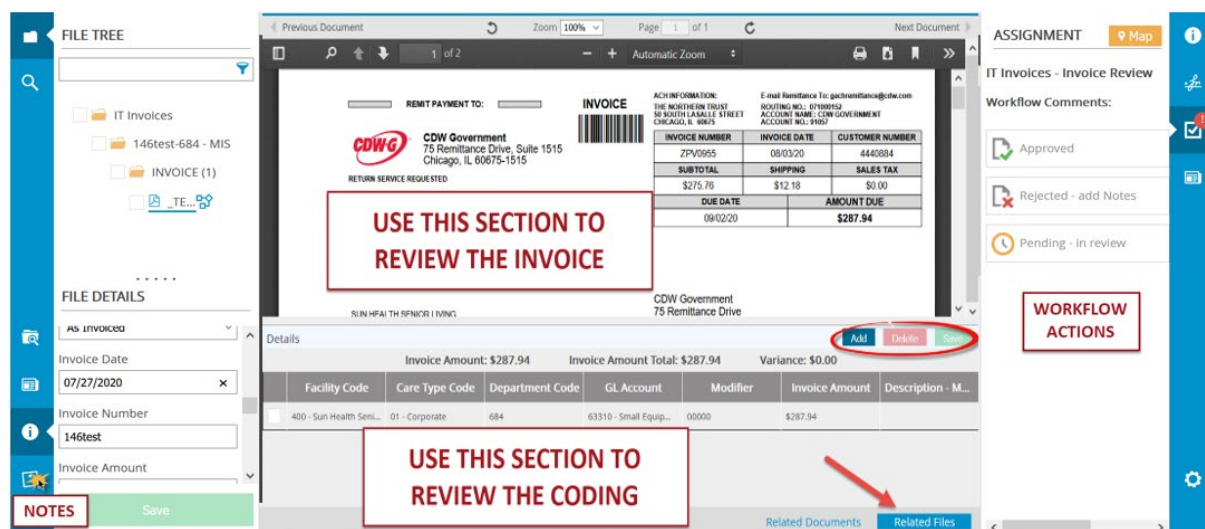
1st Level Approver – DIRECTOR STEP

The 1st Level Approver receives the FileBound notification indicating there is an invoice ready to be approved. The 1st Level Approver will sign in to FileBound and enter the initial coding needed for the invoice to be paid by the Finance department. The 1st Level will follow the following steps as an approver.

1. Log into FileBound – Assignments is your landing page.



2. Click on “Project Name” in Assignment panel to see more doc details.
3. Click the “Viewer” icon to open invoice in viewer.



4. Review the Invoice
 - Invoice Details to review are:
 1. Invoice Amount (?)

2. Invoice Amount Total (?)
3. Variance (?)
- **Enter and reviewing the Coding:**
 1. Facility Code (?)
 2. Care Type Code (?)
 3. Department Code (?)
 4. GL Account (?)
 5. Modifier (?)
 6. Invoice Amount (?)
 7. Description (?)

PREFERRED CODING ORDER For IT

Coding on invoices should be done in sequence, by facility. Doing so minimizes errors in keying of care type and allows for a quicker review by BOMs and Executive Directors (EDs) who don't have to search through the coding for their facility codes. This will make the process more efficient for everyone involved.

Facility Code	Care Type Cod
610 - Sun Health...	02 - IL
610 - Sun Health...	03 - SNF
610 - Sun Health...	04 - AL
620 - La Loma S...	02 - IL
620 - La Loma S...	03 - SNF
620 - La Loma S...	04 - AL
630 - Sun Health...	02 - IL
630 - Sun Health...	04 - AL
630 - Sun Health...	05 - SHAH
400 - Sun Health...	13 - SHSS
100 - Sun Health	16 - CT

Open Related Files to display Details panel

- Click **“Add”** button
- Enter information in each field - REMEMBER TO SAVE CHANGES!
- Add as many rows as you need - REMEMBER TO SAVE CHANGES!
- When finished entering coding, click Save
- Important Note: Watch your Variance figure directly above the rows entered. It should always be 0.00 before you process an invoice forward.
- You can also Delete a row, if necessary

SAVE CHANGES

Next, choose the Workflow Action – you’ll get a Workflow Operation Complete message – Done

2nd Level Approver - BOM STEP

2nd Level Approver receives notification there is an invoice ready for review. The 2nd Level Approver will review the invoice, coding entered and assure the variance is 0.00. If everything entered in the coding is correct, the 2nd Level Approver will approve the invoice. If there is something incorrect, the 2nd Level will reject the invoice or make the necessary corrections.

Log into FileBound – Assignments is your landing page

upland FileBound		Assignments		Search		Chuck Kerby	
Ad-hoc Route(s) assigned to Chuck Kerby							
Refresh Search Options							
Found 1 Assignment(s)							
<input type="checkbox"/>	<input type="plus"/>	Project Name	Route	Assigned By	Due Date	Details:	
<input type="checkbox"/>	<input type="plus"/>	IT Invoices	Ad-hoc Route	Barbara Day, Finance GVT	7/28/2020 7:36:00 PM	Invoice Number: 706 test Facility Code: 500 - Split Invoice	

1. Click on **“Viewer”** icon to open invoice in viewer

The screenshot displays the FileBound application interface for reviewing an invoice. The central panel shows an invoice from CDW Government. A red box with the text "USE THIS SECTION TO REVIEW THE INVOICE" points to the invoice details. Below this, a table lists line items with columns for Facility Code, Care Type Code, Department Code, GL Account, Modifier, Invoice Amount, and Description. A red box with the text "USE THIS SECTION TO REVIEW THE CODING" points to this table. At the bottom of the table, a red arrow points to the "Related Documents" and "Related Files" links. On the right, the ADHOC ASSIGNMENT panel shows a "Workflow Comments" section with a red box containing the text "Review and Approve or Reject with Notes". Below this are buttons for "Approve" and "Reject", and a "Save" button at the bottom.

Once the invoice is open

1. Review Invoice
2. Review Coding

Coding Corrections

1. If corrections are needed in coding, update the information in the line items in the **Details** panel.
2. Click green **Save** button.

Adding or Deleting Rows

- If you need to add a row, click the **Add** icon.
- If you need to Delete a row, click the box on the right side of the line item, then click the red Delete button.
- If making dollar amount changes, when finished with the changes, be sure the **Variance** is at \$0.00 dollar amount before **Saving**.

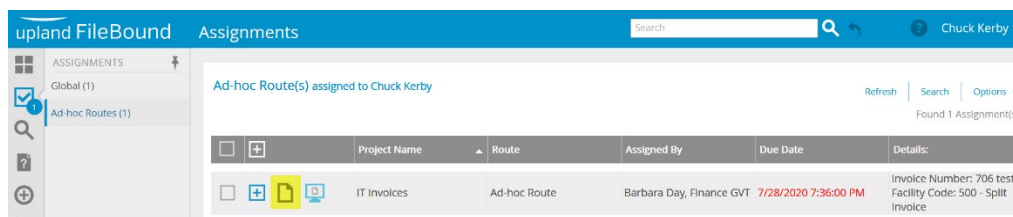
SAVED CHANGES

After the invoice and coding are reviewed, save and choose the Workflow Action wanted. Once the changes have been saved and a Workflow Action chosen, a Workflow Operation Complete message will appear and this will indicate the changes have been accepted.

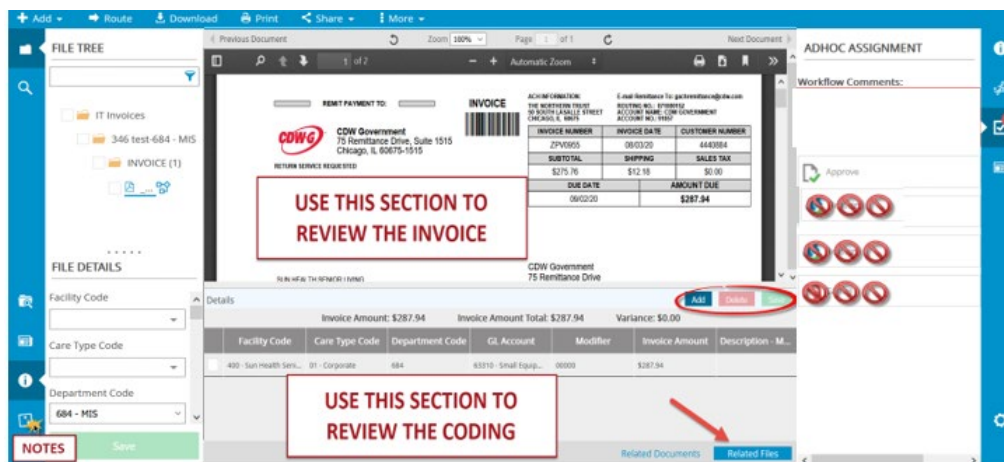
3rd Level of Approval - EXECUTIVE DIRECTOR STEPS

IT invoices are forwarded to you by your BOM for your approval; you will receive an email notification.

Log into FileBound – Assignments is your landing page



1. Click on Viewer icon to open invoice in viewer



Review Invoice

Review Coding

Please contact your BOM with any questions.

Click on Approve – you'll get a Document Successfully Routed message – Done

4th Step – Process approved invoice to Accounts Payable for payment (Project Admin)

Log into FileBound – Assignments is your landing page

Responsible for managing the status of IT Invoices – for routing files for approval to BOMs/EDs – confirming approvals – and processing approved invoices to AP for payment

How the Originator processes invoices in IT Invoices project

UPLOADING INVOICES STEP - 30 seconds

- Invoices are received and processed through the IT Invoices inbox
- Drag pdf to desktop
- In FileBound, in the IT Invoices project
- Click Add File
- Enter file details
- Click Upload Documents
- Select Invoice in field
- Browse for invoice, select, click Open
- Click Save

This routes the invoice to the assigned first level approver for review, coding and approval. Upon completion of this step, the invoice returns to the originator to Route to BOMs/EDs

ROUTE TO BOMs/EDs STEP – *depends on # of rows 1 to 2 minutes*

The coding in the Details panel will indicate which BOM(s) the invoice needs to be routed to

To route to a BOM:

- In Viewer, on toolbar, click Route
- Select Adhoc Route
- Select User
- Enter this in Comments box:
 - "For your review and approval. PLEASE REMEMBER: Route to your ED. Click on Route on toolbar - select Adhoc Route - select ED - click Save & Continue. Done. Thank you."
- IMPORTANT: select the Return the routed document to me once completed. box
- Select same day as Due Date
- Click Save & Continue
- Document successfully routed! Message will flash and disappear
- Repeat this step to all BOMs necessary
- Once the invoice has been successfully routed to all the parties necessary, go to the File Details
- In the Invoice Number field, behind the invoice number, type " - routed to (initials of people who received the invoice)"
- Remember to Save these changes
- Next, click on Route to BOMs/EDs to complete the step

TRACKING THE INVOICE – *this step may take place multiple times checking on status 1 to 2 minutes*

The BOMs route the invoice to the EDs. When email notification start returning that the BOM has acted on an invoice, anticipate that the ED approval will come shortly after (historically within the next 24 hours)

IMPORTANT: Watch the email notifications for questions/concerns about coding.

- (1) Forward these notifications to the original 1st level approver and then (2) reroute the invoice back to the original 1st level approver for resolution.

How to Track the Workflow Status

- Open Invoice in question in the Web Viewer
- Mouse across from the invoice name to get ... icon then click
- From the list select "Workflow - All"
- The workflow status report will open in a new window
- On this report, scroll over to Completed By column
- Check to make sure everyone that needed to approve the invoice has processed the invoice as necessary
 - If not, close the invoice, it's not ready to process for payment.
- If so, go back to the web viewer and see Assignment panel
- Click on (1) Approvals Confirmed then click on (2) Z-Submitted to AP (END)
- Go back to workflow status report, click Refresh
- Return to web viewer

PROCESS FOR READYING AN INVOICE FOR AP – approx. 3 to 4 minutes

- First, in File Details, in the Invoice Number field, delete any notes, KEEP the invoice number.
- Copy Invoice number in field
- Save changes
- Next Print invoice
- Click Print icon
- Select Adobe PDF
- Click Print
- Name the file
 - Naming convention currently used will flag Facility Code involved, Vendor Name, Invoice #, approved.
 - Examples: 610 Cox 121212121 approved or Multi Cox 2121212 approved
 - Click Save
- The PDF will open in Reader, expand full screen, set viewer to 75%
- Return to Web Viewer
- Using Snagit or Snipit or similar program, in the Details panel, copy the coding
- IMPORTANT remember to include in the snippet the Invoice Amount Invoice Amount Total Variance row AND the Description field (full if anything is entered, to Desc if nothing is entered)
- The purpose of this is to relate to AP whether or not the field is used.
- Return to PDF and paste the snippet on the PDF
- Return to workflow status report
- Click Export
- Depending on # of items, select either All records on current page or All records on pages x to x
- Click OK
- This report will open in Excel
- Delete these columns: Divider, Route Name, Assigned By, Due Date, Comment, and Completed Action
- Under the column Step Name, copy Invoice Review to all rows EXCEPT Z-Submitted to AP (END)
- Next, delete all rows that do NOT reflect the approval process

- The names of approvers (BOMs and EDs) should match invoice data
- Using Snagit or Snipit or similar program, copy the rows remaining – as proof of approval process - and paste the snippet on the PDF
- Save PDF

PROCESSING INVOICE TO AP FOR PAYMENT – approx. 1 to 2 minutes

- Depending on which AP Department is to receive the processed invoice will depend on the facility the invoice is coded to
- Attach completed pdf to email
- In Subject Line begin with **Okay to Pay:** (invoice details) to flag AP an invoice is attached.

Repeat steps for each invoice. Total Processing Time per invoice from upload to AP: approx. 10 mins.

How the Originator processes invoices in Construction Project Documentation project

UPLOADING INVOICES STEP - 30 seconds

- Invoices/Contracts are received and processed through the originators inbox
- Drag pdf to desktop
- In FileBound, in the Construction Project Documentation project
- Click Add File
- Enter file details
- Click Upload Documents
- Select Invoice/Contract in field
- Browse for invoice/contract, select, click Open
- Click Save
- This routes the invoice to the assigned PM for review, coding and approval. Upon completion of this step, the invoice routes to the CFO, then the invoice returns to the originator to process for payment

PROCESS FOR READYING AN INVOICE FOR AP – approx. 1 to 2 minutes

- Open File
- Next Print invoice
- Click Print icon
- Select Adobe PDF
- Click Print
- Name the file
- The PDF will open in Reader, expand full screen, set viewer to 75%
- Return to Web Viewer
- Open workflow status report
- Click Export
- Depending on # of items, select either All records on current page or All records on pages x to x

- Click OK
- This report will open in Excel
- Delete these columns: Divider, Route Name, Assigned By, Due Date, Comment, and Completed Action
- At the bottom of the Invoice Amount column add the GL Code to be used for payment
- Using Snagit or Snipit or similar program, copy the rows and paste the snippet on the PDF
- Save PDF

PROCESSING INVOICE TO AP FOR PAYMENT – *approx. 1 minute*

- Depending on which AP Department is to receive the processed invoice will depend on the community the invoice is coded to
- Attach completed pdf to email
- In Subject Line begin with **Okay to Pay:** (invoice details) to flag AP an invoice is attached.

Repeat steps for each invoice. Total Processing Time per invoice: less than 4 mins.

Search Function

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note:** You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.

Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the View Documents on Single Search Result option within the User Preferences, to display the documents for the single file using the default document viewer.

The screenshot displays the 'upland FileBound' application interface. The top navigation bar includes the 'upland FileBound' logo, a 'Search' header, a search input field, and a user profile for 'Fred Smith'. A left-hand navigation pane contains several icons, including a checkmark, a magnifying glass, a question mark, a list, a plus sign, a bar chart, and a gear. The main content area is titled 'Project Search Criteria' and features a form with the following fields: 'Project' (a dropdown menu showing 'MGI AP Invoices'), 'Invoice Number' (text input '205672'), 'Department' (dropdown menu 'IT'), 'PO Number' (empty text input), 'Vendor' (dropdown menu 'ACME'), 'Invoice Date' (date range '01/01/2014 to 03/19/2014'), 'Invoice Amount' (range '12000 to 18000'), 'Divider' (empty dropdown), and 'Separator' (empty dropdown). Below these fields is a collapsed 'Advanced Search Options' section. At the bottom of the form are two blue buttons: 'Search' and 'Save Search'.

Integrations

None

Inputs: How Invoices from vendors are uploaded into an invoice processing project in FileBound

1. Open the File Entry Page

1. Click the add content icon on the navigation pane.

- The **ADD CONTENT** menu appears.

2. Click **File Entry**.

- The **File Entry** page appears.

2. Specify Details

1. Select a project from the **Project** list.
2. The index fields for the project are displayed.
 - Specify values for the index fields.
3. You can select the Remember Fields check box, to make the system to remember values for the next entry.

Note: This feature works when you click **Save and Add Another**.

4. Select an option for **Options**.

Following options are available:

- **File Entry:** This option creates a new file without any document in it.
 - **Upload Documents:** This option displays document upload options.
 - **Generate E-form:** This option generates an e-form with the values specified for the index fields.
5. Click **Save**.

Or,

Click **Save and Add Another**, to save the box entry and add another entry.

upland FileBound Add Content Search Fred Smith

ADD CONTENT

Box Entry

File Entry

Scan Documents

Upload Documents

Address

email

Phone Number

Donation Made

Class

Remember Fields

Options: File Entry Upload Documents Generate E-form

Other Options

Divider

Drop documents here or

Upload Documents Browse

Save Save and Add Another Cancel

2.1 Upload Documents

The **Other Options** section is displayed if you have selected **Upload Documents** option.

1. You can select a divider you want to place the uploaded document in from the Divider list.
2. You can drag and drop documents within the drop documents section, to upload the documents.

Or,

You can click the **Browse** icon, to open the Open dialog box.

Select the documents you want to upload, and then click **Open**.

Outputs: How to Ready an Approved Invoice for AP for the purposes of Payment

PROCESS FOR READYING AN INVOICE FOR AP – *approx. 3 to 4 minutes*

1. Go to **File Details**,
2. In the **Invoice Number** field clear any notes in the field and be sure to leave the invoice number.
3. Copy invoice number in the **Invoice Number** field
4. Click **Save** icon
5. Click **Print** icon
6. Select **Adobe PDF** option
7. Click **Print**
8. Name the file

Note: Naming convention currently used will flag **Facility Code** involved, **Vendor Name**, **Invoice #**, approved. **Examples:** 610 Cox 121212121 approved or Multi Cox 2121212 approved

9. Click **Save**

10. The **PDF** will open in **Reader**,
Expand your view to **Full Screen** and set **Viewer** to **75%**
11. Return to the **Web Viewer**
12. In the **Details** panel, copy the coding.
Use **Snagit** or **Snipit** or any other similar application tool to make the copy.
Be sure to include in the the copy the following information:
 - The **Invoice Amount**
 - The **Invoice Amount Total Variance** row
 - The **Description** field (full if anything is entered, to Desc if nothing is entered)

Note:The purpose of this is to relate to AP whether or not the field is used.
13. Return to PDF then paste the snippet onto the PDF.
14. Return to workflow status report and Click **Export**.
15. Select the records to be exported.
Note: Depending on the number of items, there is an option that can be used to select **All Records** on the **Current Page** or **All Records** from **Pages x to x**.
16. Click **OK**. The report will then open in **Excel**.
17. In the **Excel** document **Delete** these columns:
 - Divider
 - Route Name
 - Assigned By
 - Due Date
 - Comment
 - Completed Action
18. Under the column Step Name, copy Invoice Review to all rows EXCEPT Z-Submitted to AP (END)
19. Delete all rows that **Do NOT** reflect the approval process
20. The names of approvers (BOMs and EDs) should match invoice data
21. Copy the rows remaining – as proof of approval process - and paste the snippet on the PDF using **Snagit** or **Snipit** or similar application tool.
22. Click **Save** on the PDF document

PROCESSING INVOICE TO AP FOR PAYMENT – *approx. 1 to 2 minutes*

Codes are dependent on the facility in which AP Department is to receive the processed invoice.

1. Emailing the PDF

Attach completed PDF to the email

In **Subject Line** begin with:

Okay to Pay: ([invoice details](#)) to flag AP an invoice is attached.

Note: Repeat steps for each invoice.

How to Export Data from Search?

Refer to the **Search Function** section on how to define your search in order to generate a data set for export.

To export the resulting data of your search, complete the following steps:

1. Select your project, specify values for your Search.
2. Click **Search** A **Results** page will display

The screenshot displays the 'upland FileBound Search' interface. At the top, there is a search bar and a user profile 'Dawn Hoberg'. Below this, a 'Project Search Criteria' section contains various input fields. The 'Project Type' is set to 'IT Invoices Project' and 'Project' is set to 'IT Invoices'. Other fields include 'Vendor Name' (CW Consulting (D)), 'Acct #', 'Invoice Number', 'Invoice Date' (with a date range selector), 'Invoice Amount' (with a range selector), 'Approver', 'Invoice Type', 'WF Status', 'Contract_Executed Date' (with a range selector), 'Contract_Executed Amount' (with a range selector), and 'Contract_Description'. At the bottom of the criteria section is a dropdown for 'Advanced Search Options'. Below the criteria section are two buttons: 'Search' (highlighted in yellow) and 'Save Search'.

3. Click **Option** for list In the upper right corner of the **Results** page.

upland FileBound Search Dawn Hoberg

Project: IT Invoices Refresh | Edit Search | Options

Found 8 Files

		Docume...	Vendor...	Acct #	Inv...	Invoice Number	Invoice A...	Approver	Con...	Contract...	Contract...	WF Status	File Cha
<input type="checkbox"/>		_Invoice	CW Co...		08/0...	108	\$10,000.00	Donny ...				Z-Zmanu...	1/4/202
<input type="checkbox"/>		_Invoice	CW Co...		09/0...	109	\$10,000.00	Donny ...				Z-Submit...	9/2/202
<input type="checkbox"/>		_Invoice	CW Co...		09/0...	110	\$10,000.00	Donny ...				Z-Submit...	10/15/2
<input type="checkbox"/>		_Invoice	CW Co...		10/0...	111	\$11,608.10	Donny ...				Z-Submit...	11/5/20
<input type="checkbox"/>		_Invoice	CW Co...		11/0...	112	\$10,000.00	Donny ...				Z-Submit...	12/7/20
<input type="checkbox"/>		_Invoice	CW Co...		01/0...	113	\$10,000.00	Donny ...				Z-Submit...	1/6/202
<input type="checkbox"/>		_Invoice	CW Co...		01/3...	114	\$10,000.00	Donny ...				Z-Submit...	2/15/20
<input type="checkbox"/>		_Invoice	CW Co...		02/0...	115	\$10,000.00	Donny ...				Z-Submit...	3/17/20

4. Select Export

Note: Depending on the number of items, there is an option that can be used to select **All Records** on the **Current Page** or **All Records from Pages x to x**.

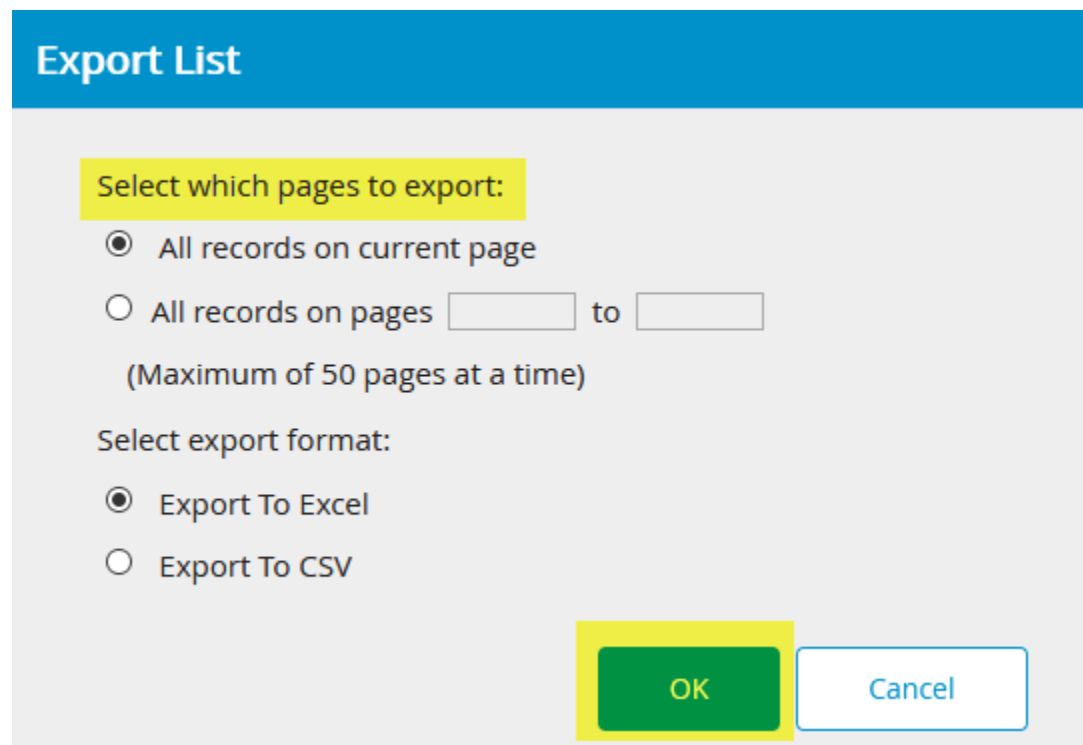
upland FileBound Search Dawn Hoberg

Project: IT Invoices Refresh | Edit Search | Options

Found 8 Files

		Docume...	Vendor...	Acct #	Inv...	Invoice Number	Invoice A...	Approver	Con...	Contract...	Contract...	WF Status	File Cha
<input type="checkbox"/>		_Invoice	CW Co...		08/0...	108	\$10,000.00	Donny ...				Z-Zmanu...	1/4/202
<input type="checkbox"/>		_Invoice	CW Co...		09/0...	109	\$10,000.00	Donny ...				Z-Submit...	9/2/202
<input type="checkbox"/>		_Invoice	CW Co...		09/0...	110	\$10,000.00	Donny ...				Z-Submit...	10/15/2
<input type="checkbox"/>		_Invoice	CW Co...		10/0...	111	\$11,608.10	Donny ...				Z-Submit...	11/5/20
<input type="checkbox"/>		_Invoice	CW Co...		11/0...	112	\$10,000.00	Donny ...				Z-Submit...	12/7/20
<input type="checkbox"/>		_Invoice	CW Co...		01/0...	113	\$10,000.00	Donny ...				Z-Submit...	1/6/202
<input type="checkbox"/>		_Invoice	CW Co...		01/3...	114	\$10,000.00	Donny ...				Z-Submit...	2/15/20
<input type="checkbox"/>		_Invoice	CW Co...		02/0...	115	\$10,000.00	Donny ...				Z-Submit...	3/17/20

Print
Export
Add All to Clipboard



Export List

Select which pages to export:

☒ All records on current page

☐ All records on pages to
(Maximum of 50 pages at a time)

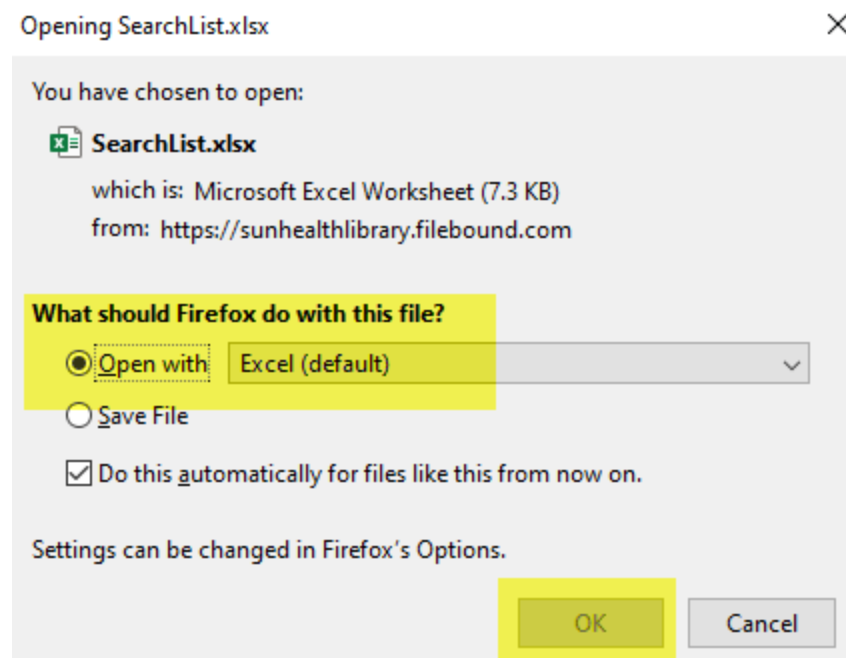
Select export format:

☒ Export To Excel

☐ Export To CSV


OK Cancel

5. Click **OK** The data will then appear on an Excel spreadsheet



Opening SearchList.xlsx

You have chosen to open:

 **SearchList.xlsx**
which is: Microsoft Excel Worksheet (7.3 KB)
from: <https://sunhealthlibrary.filebound.com>

What should Firefox do with this file?

☒ Open with **Excel (default)**

☐ Save File

☒ Do this automatically for files like this from now on.

Settings can be changed in Firefox's Options.

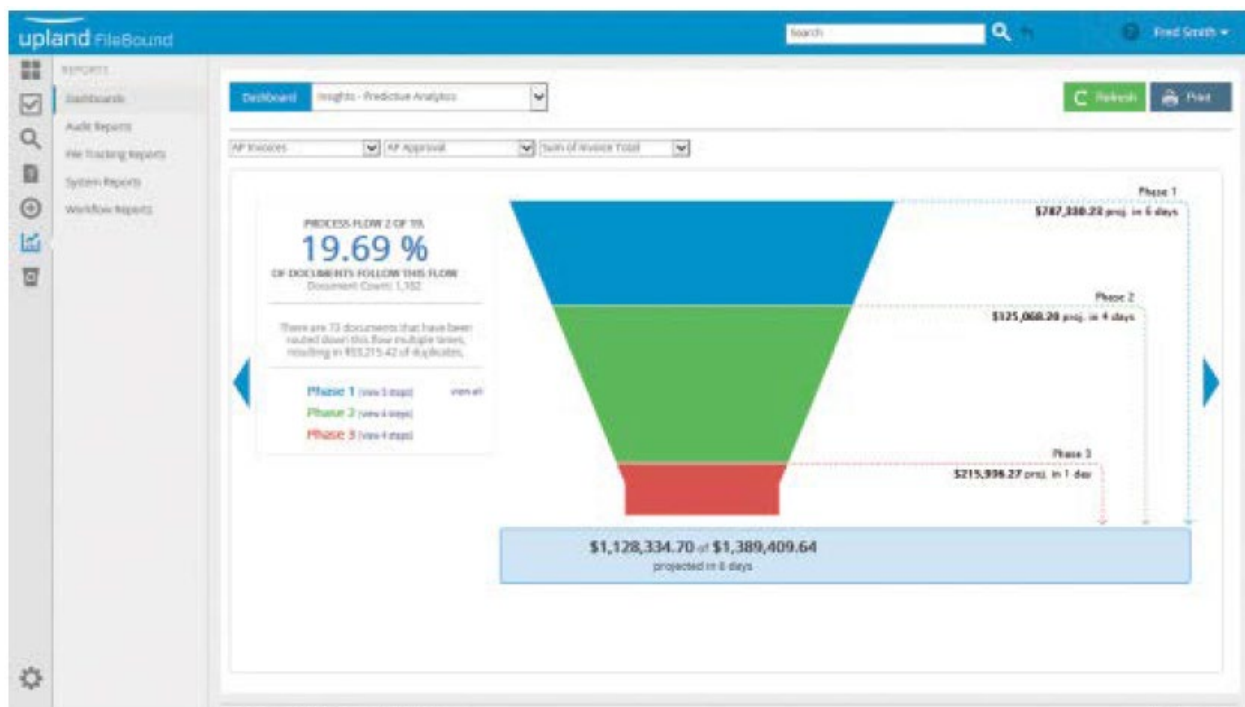
OK Cancel

Dashboards:

FileBound Dashboards provide users a visual representation of how their system is being used and the expected performance of their processes. Our dashboards provide administrators charts and graphs of important information about who is using the system, what they are doing, and how they are doing it.

In addition to this information, FileBound also provides meaningful, actionable, and timely reports called Insights that, based on historical data, predicts the movement of information through their FileBound system.

These insights are used to provide visibility into the processing of individual items or a whole process against historic averages.



Use Case:

A controller for a manufacturing company needs information about invoices that are currently in an approval process. They are able to use a dashboard to see how many invoices are at a given step within the process. The controller is then able to look at the total value of invoices and receive information on when those invoices will complete the approval process based on past performance. The controller is able to see the total amount that will be due to a specific vendor. Using this information the controller is able to adjust any payment schedules to take advantage of discounts or avoid missing due dates.

