



FileBound 7.1

Features



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Introduction

With the launch of FileBound 7.0, we delivered undeniable enterprise-class functionality and performance. Our 7.1 release builds on those capabilities as we continue to add features that make daily work easier - and now we've extended your reach outside the walls of the enterprise.

By focusing in on public accessibility, usability and the overall performance power of FileBound, we're able to deliver a solution to customers that is highly adoptable across any organization and where the ROI is often realized in months if not weeks.

This document highlights some of the features we added with FileBound 7.1; a release that focuses on enhancing the areas of FileBound that are used most - the Search page, the Workspace and the Web Viewer. But we didn't just add capability - we also fine-tuned the performance of those capabilities. We honed in on three areas: optimizing the download speed of the Web Viewer's treeview, increasing the speed of the Window's Viewer download for first time use, and performance enhancements on the auto-index and site-OCR components of Automation Processes.

By focusing on performance enhancements for the most-used areas of our site, our customers see an immediate difference in the responsiveness of FileBound. Giving them the ability to customize the way they work through Workspaces and individual Viewer preferences helps our customers work smarter and faster. Finally, by breaking down the walls between business and customer, we've made the exchange of information seamless and easily accessible on any device.

Capability without complexity. It defines everything we do and how we do it.

Public Access



A crucial piece of any business is the ability to share information from within a system to customers and vendors outside of it. FileBound's Search and Forms Portals are designed to do just that.

Accessible from any desktop, Android or iOS device, you can share access – full or limited – to information seekers outside of the FileBound system and give customers a venue for submitting information into FileBound.

FileBound's Public Access Portals allow you to interact with your customers at a level never offered before.

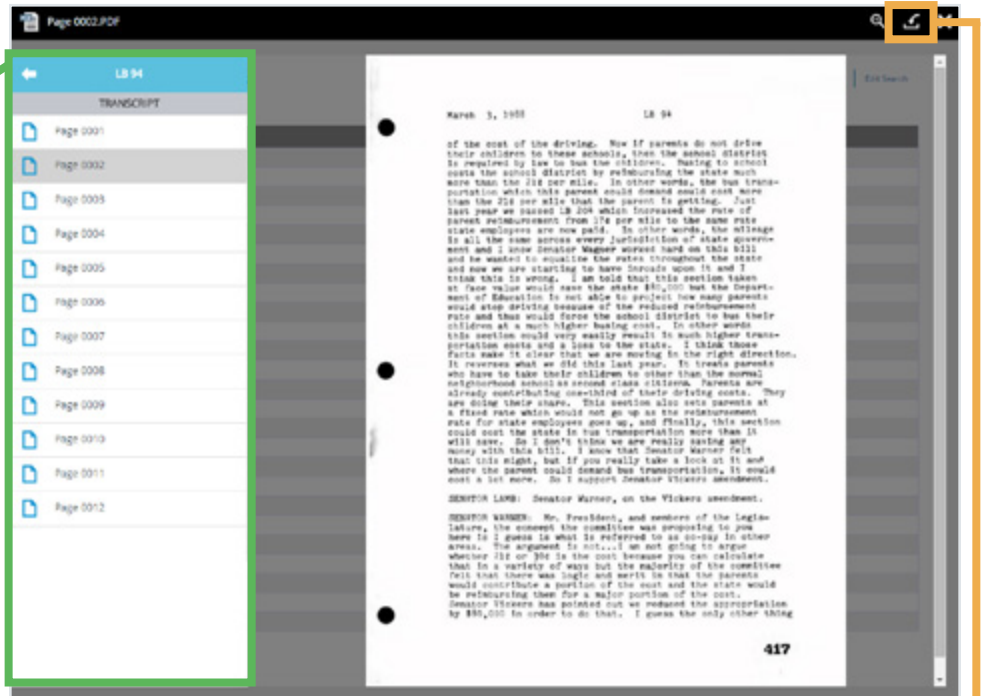
Search Portal

The Search Portal is the public's access point for information and documents from within your FileBound system. In the same way you can restrict or grant access to groups within your company, you can choose which projects and folders to make available to your customers, and also choose to give them full access or limited access via access codes or passwords.

Though beneficial for any company looking to share information with anyone outside of their FileBound users, this feature is specifically helpful for our government customers who, per the Freedom of Information Act, are required to make certain documents publicly accessible.

File Navigation

When creating projects for the portal, it's important to structure the folders and document names in a way that someone unfamiliar with an organized document management system is able to easily navigate and find the file they are looking for.



Downloading Documents

Assuming you give them rights to do so, any user can download documents straight from the portal.

Use Case

A state government makes public its debate transcripts regarding proposed legislation. The State wants their users to be able to search these transcripts by date or by bill number. Furthermore, they want this information to be accessible via the state's website.

By embedding FileBound's Search Portal into their website, the State's populace can access the transcripts simply by visiting the State's website. Permission have already been created that allow the populace to download the documents posted to its site.

Alternatively, if the State receives a request for information from a citizen outside what is already publicly available, they can grant one-time access or multiple-use access to specific users for specific documents within the system using access codes generated in the Portal's design console.

Forms Portal

Though introduced with FileBound 7, the Forms Portal is another key element our Public Access solution. In contrast to the Search Portal where the public can access information, FileBound's Forms Portal is a tool where the public can submit information and requests straight into the FileBound system.

Access to specific forms can be restricted through the use of single or multi-use access codes or via a FileBound login, and can be embedded straight into your website. Submissions feed straight into FileBound and can even initiate workflow processes and notifications.

Since the release of FileBound 7.0, we have added a number of capabilities around field validation and calculation, drop-downs containing information from other projects and pre-built rating scales that can be dropped right into a form and customized for your use case.

Project Link Drop-down

Save yourself time by creating project link drop-downs that pulls it's list from a specified project. Every time a file is added to the linked project, the update is automatically shown in the list.

Validations and Calculations

In addition to creating mathematical formulas for number fields, you can also program fields to validate numbers, email addresses, zip codes and a range of other validations.

Rating Scales

Our Likert scales are easy to configure for the items you want to rate. You can add as many questions as you'd like, and even change the standard response scale to a custom range that better fits your needs.

How well do you like your job?

Your Name: Your Title:

Your Department: Your Supervisor:

Your Department dropdown menu:

- Sales
- Quality Assurance
- Operations
- Finance
- Marketing
- R&D
- IT
- Security
- Facilities
- Human Resources

Rating Scale:

Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	N/A
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How many hours per week do you spend on the following tasks?

Assigned tasked:

Administrative Duties:

Meetings:

Total: 40

What are some ways that we can improve your work environment?

Comment:

Use Case

The Engagement Committee for a firm with over 400 employees wanted to learn whether their employees enjoyed their jobs and where they felt they spent most of their time. To do this, they created a form like the one shown.

Using a rating scale, they gauged the employees' opinions regarding a variety of topics from work environment to transparency and company leadership to their professional development program. The committee also asked the employees how many hours out of their week they spent doing specific tasks outside of their job description. All of this information was compiled and presented to the Executive Team as part of their annual company review.

Enhanced Usability



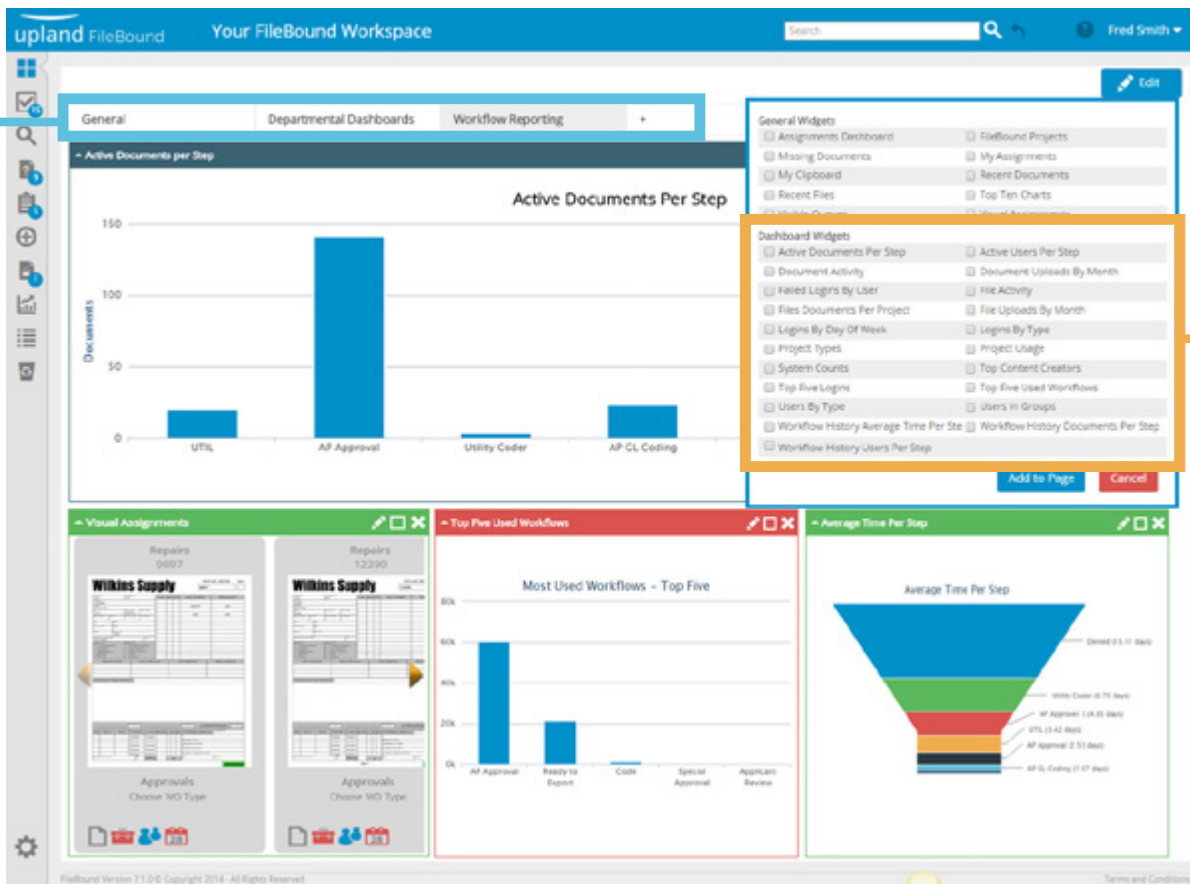
When companies invest in systems, they are focused on the utility that system can provide; but it's the usability of the product that ignites rapid adoption and dramatically shrinks the timeframe to ROI.

At FileBound, the user experience of our product is paramount to our success. In every release, we look for ways to improve the areas of the site that people most use.

Workspace Organization

Reporting can be made more efficient when the content is all in one place and organized effectively. It's for this reason that we've added a tabbed menu to the FileBound Workspace and, for our FileBound Enterprise customers, the ability to add our dashboard reports to the Workspace.

The best part is, each individual can set up their workspace according to their preference and work duties. Reports and widgets can now be grouped based on functional area, project, document, activity - or any other combination that let's them work more efficiently.



Dashboard Widgets

Many of the graphs and charts that are available in our Dashboards section can be added to your workspace to give you more visibility into the work being performed.

Workspace Tabs

Arrange and organize your widgets by project, process or by function. Grouping widget in this manner gives you instant insight into how a specific area is performing.

Use Case

In addition to the widgets he currently uses, the Controller of a manufacturing firm wants insight into the amount of work his clerks are able to process. Using Workspace tabs to organize his information, the Controller is able to create new sections to display his user/group specific dashboards as well as a section for his workflow reporting dashboards.

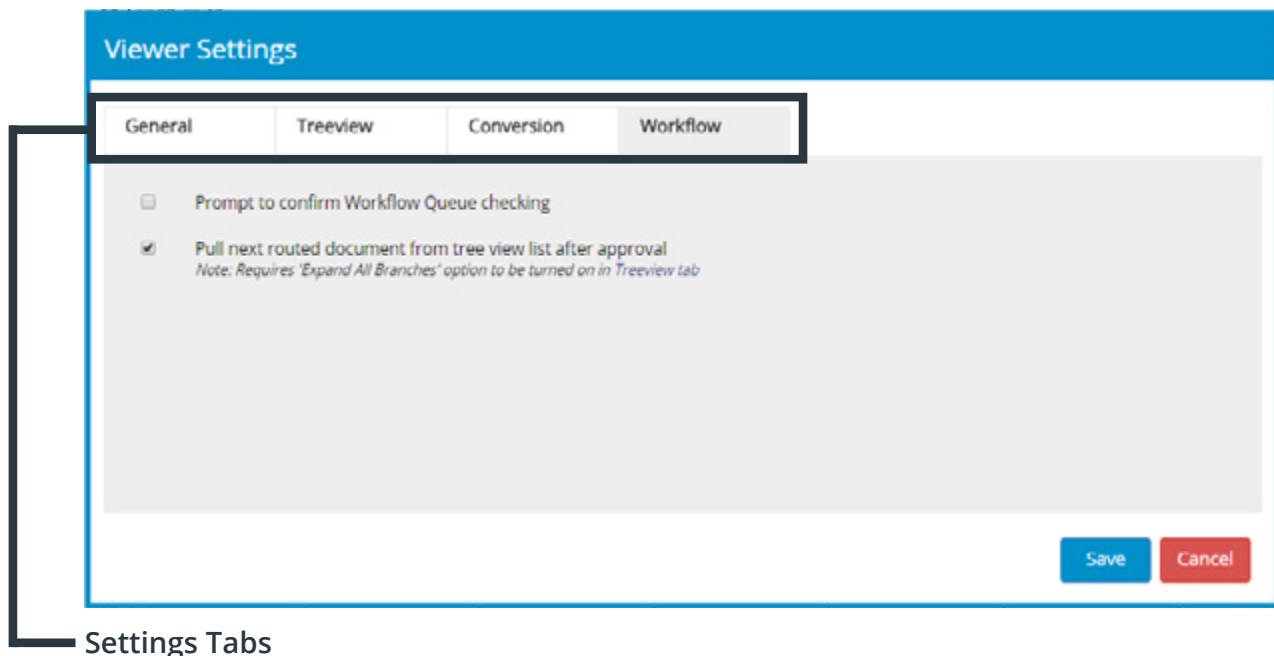
Web Viewer Enhancements

We continue to improve the most used areas of our viewer in order to continue enhancing the experience and usefulness for our users.

Personalized Settings Menu

Everyone has their own preference on how they want to view, export and email their files while in the viewer – now each user can configure their experience with the settings that fit them best. The menu has been split into tabs to logically group the preferences for the Treeview, Conversion options, Workflow actions and General settings.

New options include setting and remembering all panels, choosing if and when exports and emails convert the image to PDF, and whether or not to display your next assignment after completing your current one.



Settings Tabs

Each tab has a set of configurations for the viewer so that you can customize everything from how the folder tree is displayed to how documents are converted upon export or email and whether or you want to save your viewer panels.

Use Case

A Sales Manager is set to approve multiple expense reports from his Account Executives. With 23 reports to review for this week, he's able to work more efficiently by selecting the setting that pulls the next routed document from treeview list after each approval.

By doing this, the manager saves time from selecting each assignment individual to review and approve. Instead, he can load all of his reports into the viewer and take decisions on them in succession without needing to go back to his assignments page.

Line Item Improvements

For those who use FileBound as part of their accounting system, we've added some small, but useful updates to our Line Items plug-in. The plug-in now uses a new grid and calculation tools that will retain column widths and instantly display the variance between line items and the invoice total.

Invoice Details:

Apollo Inc.
I N V O I C E

Invoice #: 205672
Invoice Date: 9/3/2009
Customer ID: Y-12945

Bill To: Meyers Distribution
1650 Pharma Road
Burlingame, CA 94001

Ship To: Meyers Distribution
1650 Pharma Road
Burlingame, CA 94001

Date	Your Order #	Our Order #	Sales Rep.	FOB	Ship Via	Terms	Tax ID
6/30/09	709-96285		Tom			Net 30/2-10	

Quantity	Item	Units	Description	Discount %	Taxable	Unit Price	Total	
250	HZ-7325	each	Rear Gear Assemblies		resell	129.72	\$32,430.00	
175	CX-8610	Each	HD Brake Kit			239.52	\$41,916.00	
							Subtotal	\$74,346.00

Line Item Indexing

Invoice Total: \$74346.00 Line Item Total: \$74346.00 Variance: \$0.00

Qty	Item	Description	Unit Price	Total	GL Code
250	HZ-7325	Rear Gear Assemblies	129.72		32430 Inventory Warehouse - Retail/Parts
175	CX-8610	HD Brake Kit	239.52		41916 Inventory Warehouse - Retail/Parts

Resizing Columns and Total Variances

Need an extra wide column to fit your item descriptions? You can stretch columns to the exact width you need and, when you set your viewer preferences to remember panel settings, the columns will be pre-configured for you the next time you enter the viewer.

Use Case

An Accounts Payable Clerk is in charge of GL coding invoices in FileBound for the Facility department. Their GL codes are long, so he resizes the column to show the full length and as he enters each line item, the variance tool shows him exactly how far he is from the invoice total.

Treeview Usability

Users can now drag and drop documents from one folder to the next and right-click to delete folders or remove files from the viewer's file tree. The inclusion of these capabilities improves the experience for our Mac users and those who only use our web viewer.

Drag and Drop

Moving documents from one folder to another is easy - just drag and drop it into the desired location!

The screenshot shows a file tree on the left with folders like 'Admissions Applications', 'SUBMITTED DOCUMENTS (1)', 'APPLICATION (1)', 'TRANSCRIPTS (1)', 'SAT SCORES (1)', and 'RECOMMENDATIONS (2)'. A green arrow points from the 'Recommendation_DrSteinmen' folder in the tree to the 'Pre-College Application for Admission' form on the right. The form contains sections for 'Select Pre-College Option', 'Full Name and Prior Attendance', 'Permanent Address and Phone', and 'Personal and Parent/Guardian Information'. The form is filled out with handwritten information for a student named Mark Douglas Jackson from Chicago, IL.

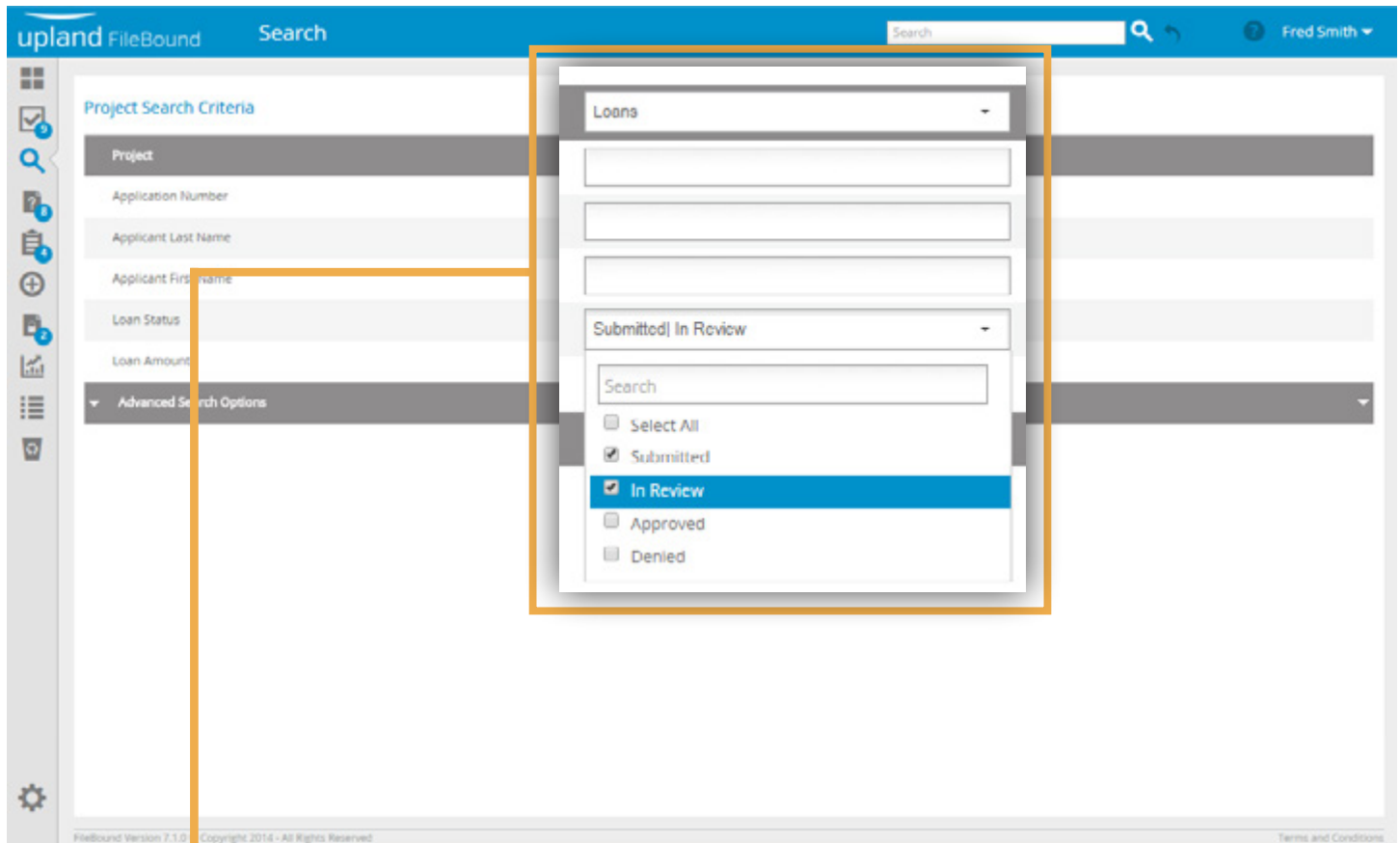
Use Case

A student interested in attending State University submits his online application to the admissions department and attaches his transcripts, SAT scores and letters of recommendation. The information is submitted to the university's FileBound system where a file is automatically created for the applicant.

The admissions department watches for and reviews submissions daily by loading all candidates into FileBound's viewer. For candidates who qualify for admittance, an Admissions Coordinator sorts the applicant's submitted documents simply by dragging and dropping the documents into the appropriate folders. After all of the documents have been sorted, the coordinator can right-click on the student's application to lock it from being tampered with and then right-click on the file to dismiss it from her viewer.

Search Usability

Using the multi-select option for option lists in the search menu allows the user to return a more inclusive result set. Users can now see all of their results with one search instead of using multiple searches.



Filtered Searching

In addition to selecting multiple options to search on, we've included a search capability that filters the result list as you begin typing the term you're looking for - decreasing time and making it easier to find what you're looking for.

Use Case

To get a better idea of her current case load, a loan officer logs into her FileBound site and, using the multi-select drop-down, searches for all loans with a "Submitted" or "In Review" status. The results show that she has 17 active loans which she can sort by amount to help her better prioritize her day.

Error Diagnostics Console

Since the release of FileBound 6.6.0, your FileBound system has been logging the errors that have been incurred by users so that our support team can better diagnose issues. But those error logs have always been difficult for the system administrator to review – until now.

With FileBound's System Errors Console, anyone with rights to reports or Central Administration can now view the error logs. Visibility into these errors will help with troubleshooting and diagnosing FileBound issues.

The screenshot shows the FileBound Reports console. The 'System Errors Report' is selected in the sidebar. The main area displays a table of error logs with columns for Error ID, Date, Message, and Stack Trace. The table contains 23 items. A gear icon in the sidebar is highlighted with a box, and a line connects it to the text 'A More Detailed View' below.

Error ID	Date	Message	Stack Trace
10012014120127164	10/1/2014 12:01:27 PM	Security Login Error	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10012014120143441	10/1/2014 12:01:43 PM	Security Login Error	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10022014092851585	10/2/2014 9:28:51 AM	Security Not Loggedin	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10022014093009387	10/2/2014 9:30:09 AM	Eform Name Already Exists	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10022014093019287	10/2/2014 9:30:19 AM	Eform Name Already Exists	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10022014122850321	10/2/2014 12:28:50 PM	Generic ErrorCode	at System.Web.Mvc.ActionDescriptor.ExtractParameterFromDictionary(Pa...
10022014122850784	10/2/2014 12:28:50 PM	Generic ErrorCode	at System.Web.Mvc.ActionDescriptor.ExtractParameterFromDictionary(Pa...
10032014102809979	10/3/2014 10:28:10 AM	Security Not Loggedin	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10082014145925153	10/8/2014 2:59:25 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10082014145926534	10/8/2014 2:59:26 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10092014103342220	10/9/2014 10:33:42 AM	Security Login Error	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10092014124110239	10/9/2014 12:41:10 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10092014124111563	10/9/2014 12:41:11 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10092014124327649	10/9/2014 12:43:27 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10092014124328629	10/9/2014 12:43:28 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10092014154830709	10/9/2014 3:48:30 PM	Generic ErrorCode	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10102014165413094	10/10/2014 4:54:13 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10102014165415157	10/10/2014 4:54:15 PM	Generic ErrorCode	at FileBoundV6.Models.DocumentLocks.GetLockDocument(int64 rangeBe...
10152014092018319	10/15/2014 9:20:18 AM	Security Not Loggedin	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10162014073414884	10/16/2014 7:34:15 AM	Security Not Loggedin	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10162014115234839	10/16/2014 11:52:34 AM	Security Login Error	at FileBound.FBException.GetStackTrace() at FileBound.FBException.cto...
10162014141300464	10/16/2014 2:13:00 PM	Generic ErrorCode	at System.Web.HttpServerUtility.ExecuteInternal(HttpContext handler, T...

A More Detailed View

While the report offers a glimpse into the errors received, more detailed information regarding each error - including the full stack trace - can be found in Central Administration under the System Errors node.

Use Case

A FileBound user was getting random errors that they could not consistently reproduce. They called into FileBound's support team to report the errors and, using FileBound's System Errors Console, they were able to search the date and find the exact time for when they were experiencing the errors. This allowed them to provide the full error details to the support team in order to diagnose and quickly solve the issue.