



# **FileBound**

**An Introduction  
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## **Purpose:**

This document provides you with an introduction to the baseline FileBound application environment. It will cover basic concepts, how to navigate the menu, and review/use menu options.

## **What is FileBound?**

FileBound is an umbrella term for software products that facilitates workflow automation by providing a centralized approach for digital data capture, document storage, retrieval, and desktop integration with line-of-business applications such as Skyward.

## **Baseline Product**

Secured central repository used to build, process, store, organize, share, and access information and documents.

## **Why FileBound?**

The FileBound interface will serve as the new home for Liquid Office forms and other documents used in the district.

FileBound contains different solutions to accommodate different needs, from scanning and importing documents to employee records management. Including automation for managing daily business functions.

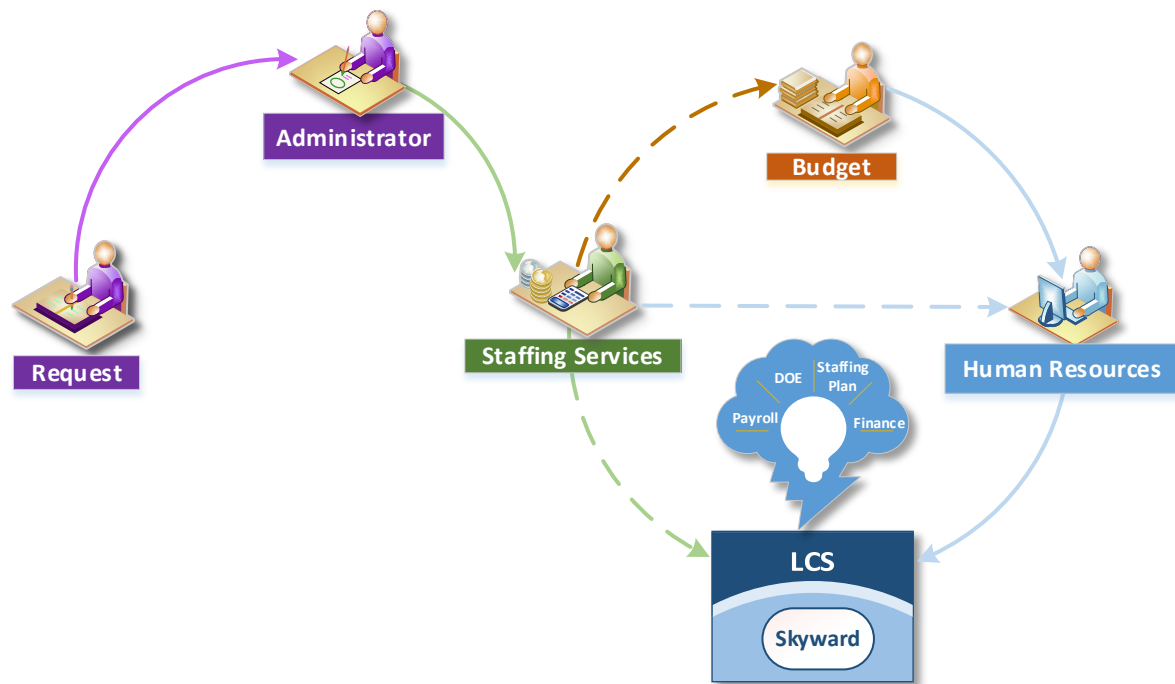
Portfolio of products:

- Connect** Application Interface (API) desktop tool designed to provide seamless integration with Skyward.
- Capture** Desktop tool that provides a batch approach to digitally capture documents and forms.
- Importer Pro** Server based application that provides a automated approach to digitally capture documents, forms, update data stores.

## Use Case - Selecting a Suitable Form

The Position Control Form (PCF) was selected as the preliminary offering to demonstrate the FileBound automated workflow, form environment, and Skyward integration capabilities.

This decision is based on the District's use of the PCF, as it touches most of the core business groups and processes. Necessary for reporting and maintain the District's staffing budget.



## Basic Concepts

The following are some of the essential terms and concepts that you need to understand before you start using FileBound.

### Users

A FileBound user can log in to FileBound with a username and password and perform operations according to assigned rights, depending on the project and your role within FileBound.

Besides general users, there are four other types of users in FileBound: System Administrator, Project Administrator, Access Administrator, and Group Administrator.

### Groups

You can create different user groups based on users' roles and objectives of a 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. Group permissions control rights to files, documents, and workflow. You can also set various file and field-level security options for a group.

### Projects

A FileBound project is the highest level of organization created within FileBound, designed to mimic the real-life traditional method of physically organizing files and paper documents in a filing cabinet.

Each cabinet holds one or more files containing documents related to a specific department or business process.

FileBound provides the same functionality by storing files and documents (converted into digital format) in a project rather than in a filing cabinet. A FileBound project represents its real-life counterpart, the filing cabinet.

### Files

In a file room, physical files (or folders) store and organize related documents within a filing cabinet. A similar organization happens in FileBound, where a file is a searchable container for various associated documents, not to be confused with a computer file.

You can represent a similar scenario in FileBound. As an example, employee files. First, you will need to scan or create documents to make them available in a digital format. Second, a project named "Employee Records" is created, followed by adding a file for "Keith Adams." In the file, you can store all documents belonging to Keith.

FileBound allows you to create index fields for files in a project. Then, 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 "employee records" project, then you can find Keith's file easily by searching for "Keith." However, note that the result will return file records of all customers with "Keith" as their name.

## Documents

FileBound allows you to work with a wide range of document types. For example, you can scan and save documents directly into a specific location in a file or import documents. For the district, these document types include forms.

## Dividers

The documents stored within a project file can be grouped logically according to dividers. Dividers are set up at the project level, making them 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.

## Separators

Separators can group **dividers** logically in a file according to the business requirement. Separators set up for a project are available to all the files in the project.

For example, you can group your **dividers** according to a specific month. Then, you can create separators named according to particular dates. Once these separators are in place, you can search for a file using the advanced search options by selecting a separator name as a search parameter.

## Viewers

Document Viewers allow you to view and modify documents stored within a file. Within FileBound, there are two different types of document viewers available:

- ✓ Web Viewer: The Web Viewer opens in a new tab within your browser and provides much of the same functionality as the Windows Viewer in an easy-to-use, updated interface.
- ✓ Windows Viewer: The Windows Viewer must be installed separately on your computer. It provides a more streamlined document view for those that do not want or need the additional features offered by the web viewer.

## Workflow


Workflow routes a document to a user or group to complete an action or set of actions through a predefined set of steps called a process. For example, documents can enter a workflow when scanned or imported into FileBound, or when a form is generated.

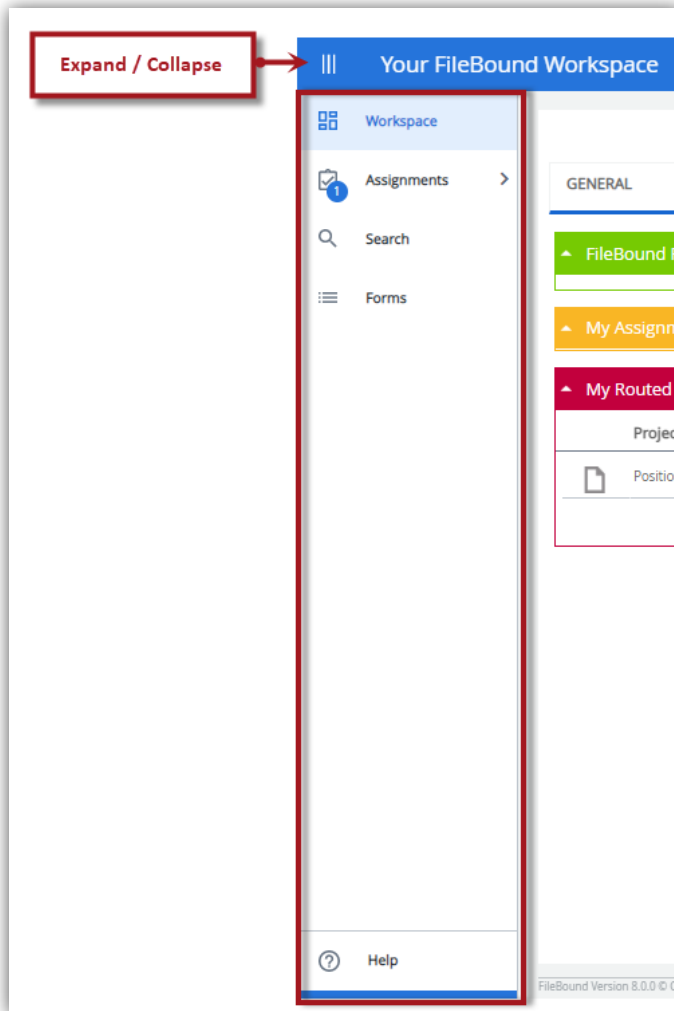
Here are a few examples of other things that workflows can do:

- ✓ Make decisions based on values
- ✓ Update information
- ✓ Send emails
- ✓ Create new forms
- ✓ Perform checks and validations

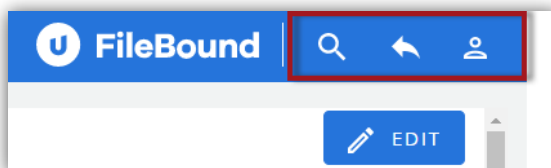
## Navigation Menu






Located along the left side of the page is the main Navigation Menu. The options displayed on the menu will vary based on your permissions and site configuration. The Navigation menu, by default, is collapsed; clicking the Navigation Menu icon  to expand it.



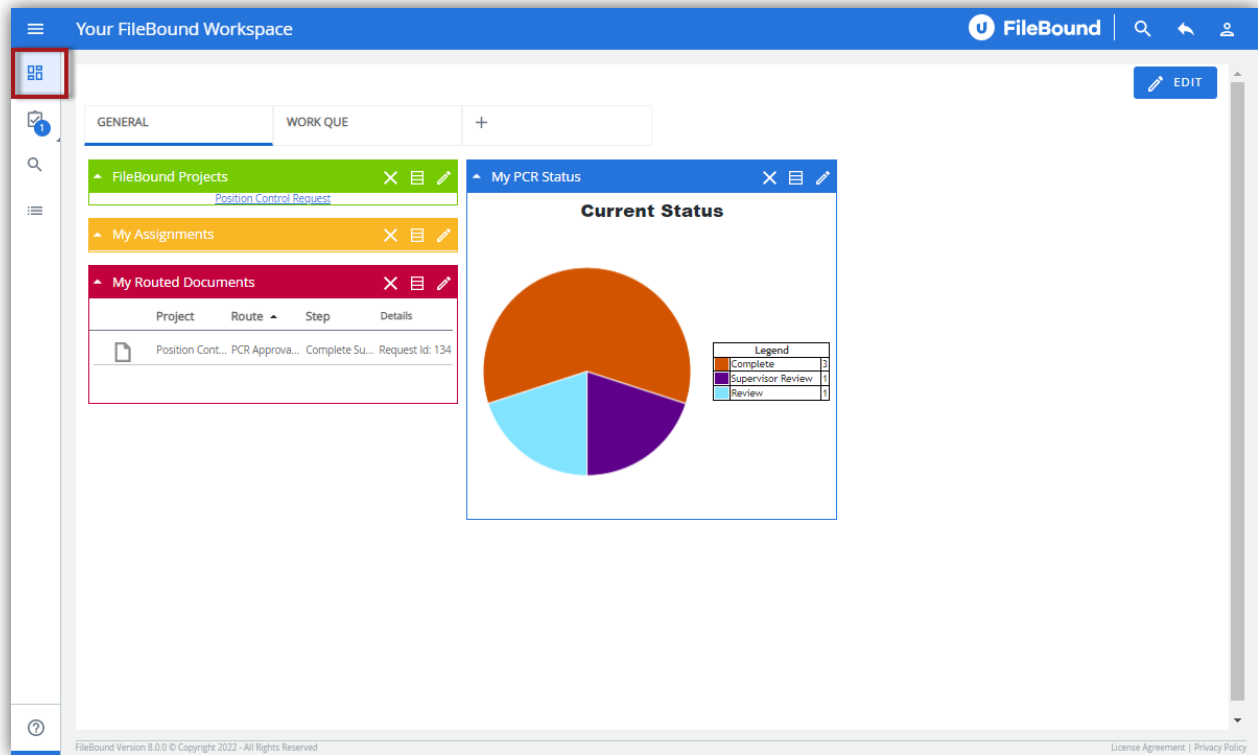
Located along the right side of the page, you will find your global search, return (to last), and profile options.




-  While in FileBound, we recommend avoiding using your browser's backward  button; doing so will automatically log you out of the application. Instead, use the last  option from the navigation menu to return to a previous page where applicable.



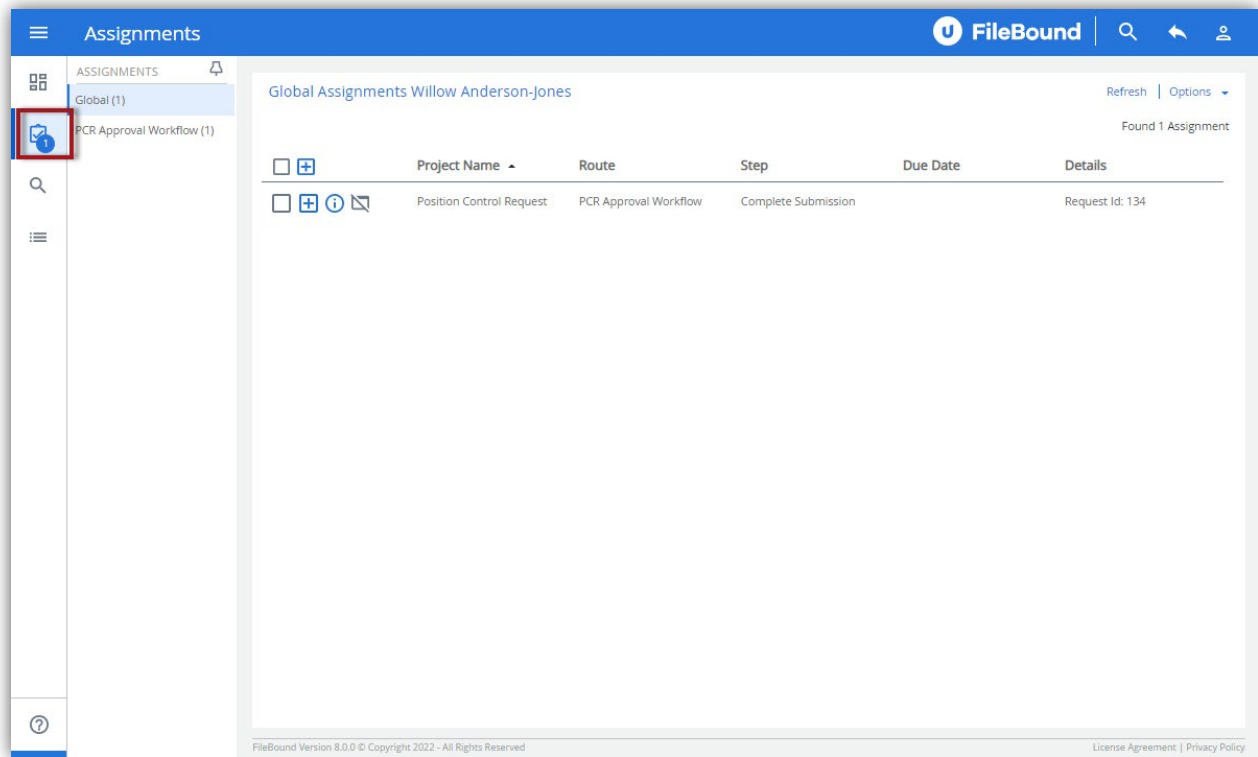
## The Workspace



FileBound provides a Workspace for faster access to projects, files, and documents via widgets. Widgets are sections within the workspace that display information. Widgets can be set up according to your preferences for work related duties.

1. From the navigation menu, click the Workspace icon  To display the Workspace immediately when you sign into FileBound, you can set your start screen to Workspace in your user preferences.

## Assignments



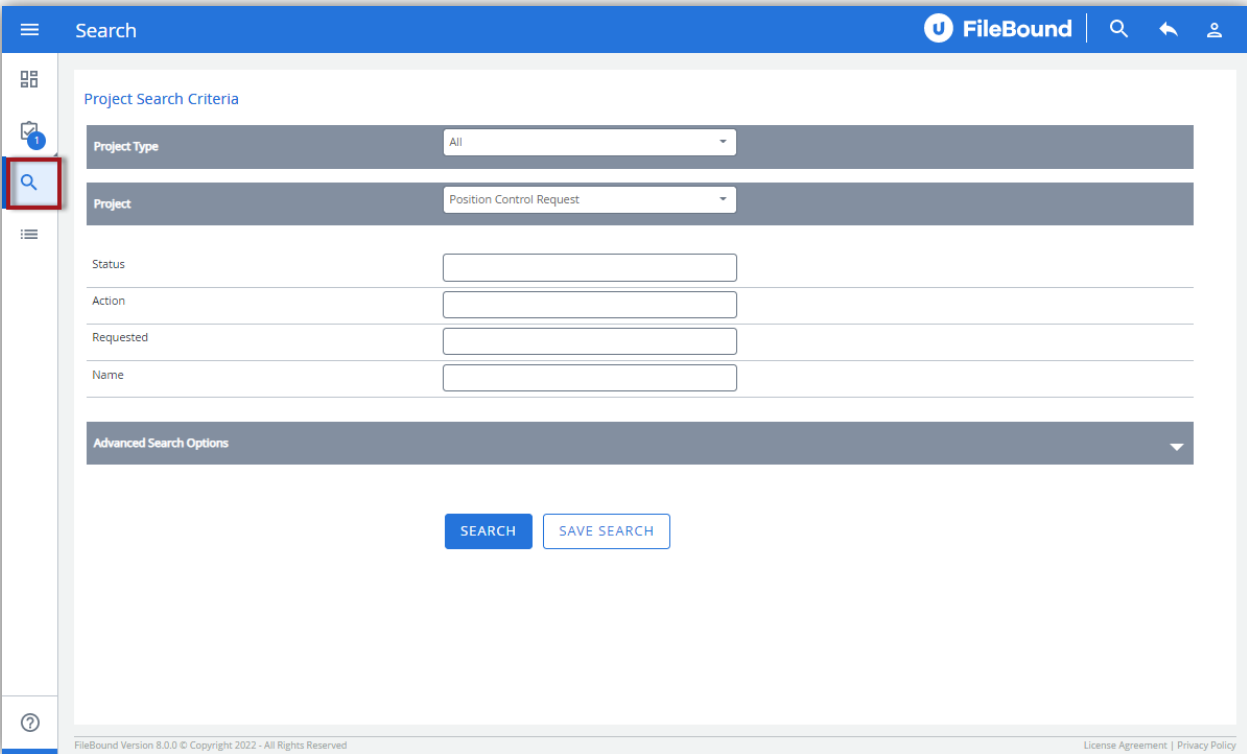
In FileBound, configured workflows contain a series of configured tasks or steps. For example, an individual or a group completes review/approval steps by assignments.

You will find steps awaiting completion assigned to you or your group on the **Assignments** page. FileBound controls three (3) types of assignments that, based on the project workflow configuration, will appear on the **Assignments** page:

- ✓ **Global** – A compressive listing of tasks assigned through workflow processes and ad-hoc reporting.
- ✓ **Ad-hoc Routes** – A list of documents posted to you by another user.
- ✓ **Assignment Queue** – A list of documents (forms) assigned to you through a configured workflow.

**i** The PCR project approval process has various form validation routines associated with given steps. For this reason, we recommend using the **Assignment Queue**, unless noted in the approval instructions, on PCR workflow assigned tasks.

## Search



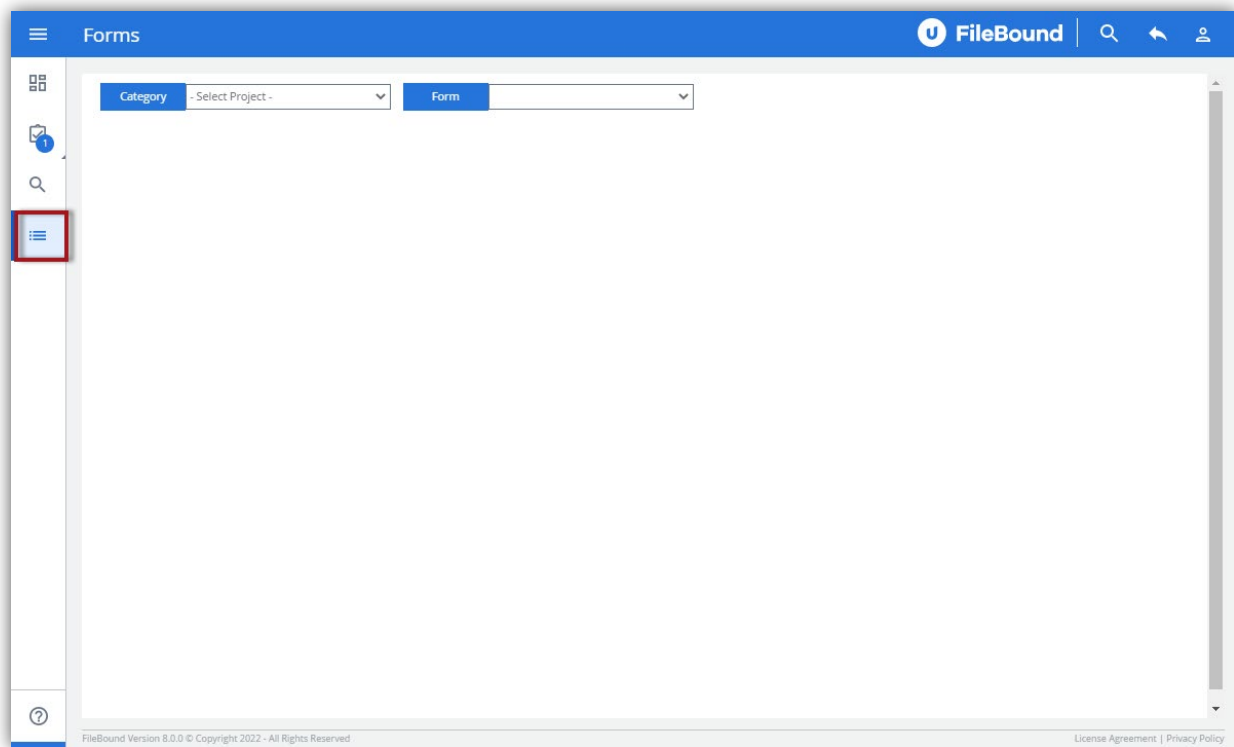
Search is a simple and primary function that you can perform in FileBound. Search allows you to retrieve and view content and data quickly. For example, you can use the Project search to find files within a specific project or use the Global search to search across all projects.

To use the search functionality, you must be assigned to a group that has the "File Search" file right for all or specific projects.

Search option examples:

- ✓ Project
- ✓ Index (Key) Fields
- ✓ File Notes
- ✓ Document Notes
- ✓ Separator
- ✓ Divider
- ✓ Date Change

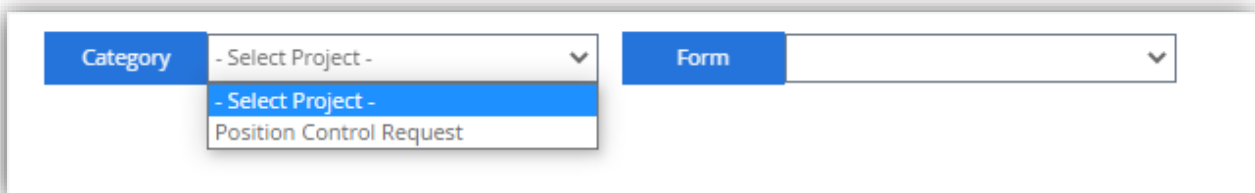
## Forms



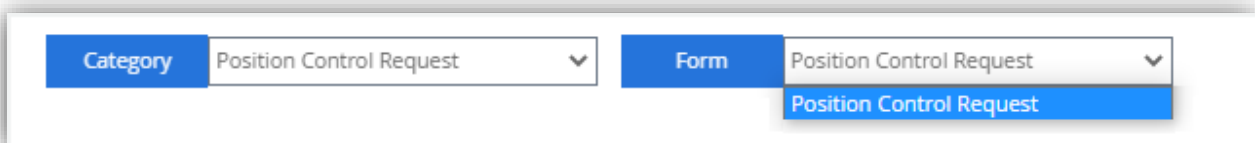
The Forms menu allows you to fill out forms assigned to a project based on access rights.

### How to Use the Forms Menu:

1. From the navigation main menu, click **Forms** icon
2. Select a project from the **Category** drop-down list.



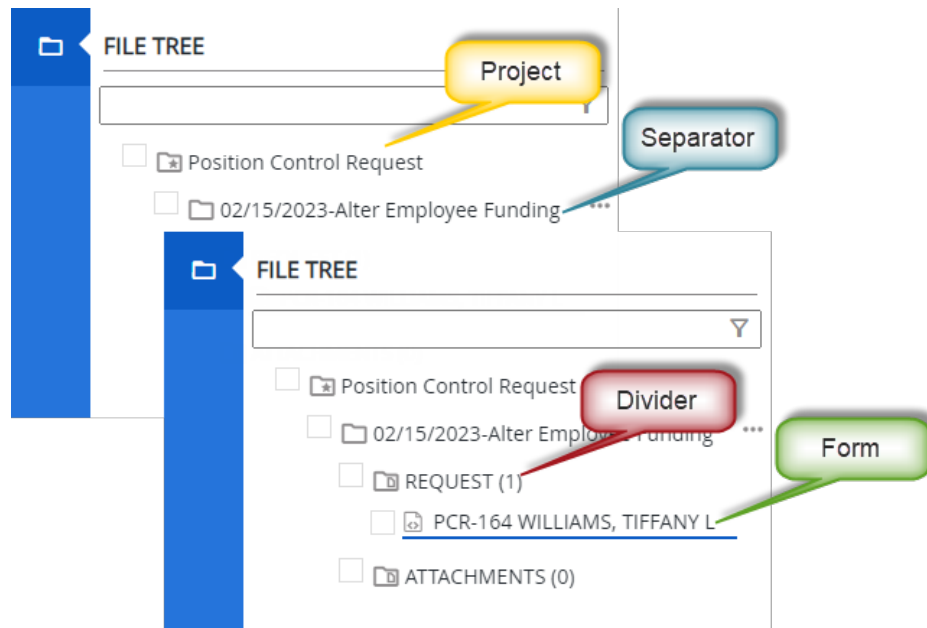
3. Select a form from the **Form** drop down list.



4. Fill out form information as required and submit.

## Project Definition - Position Control Request

The project provides access to and management of position control request documents. Following the FileBound structure hierarchy, the project contains a separator based on the desired action. Under the action separator, dividers distribute the document (form) and the uploaded attachments.



Skyward ERP is the central platform for providing employee data to the PCR project. Employee profile and position control data are the primary sources for request selection. Skyward data is *not updatable* within the FileBound project.

Searchable data fields within the project consist of the following:

- ✓ Requested (date)
- ✓ Requested Action
- ✓ Facility
- ✓ Status
- ✓ Name (Last, First, Middle)
- ✓ Employee Id
- ✓ Nalphekey

Built-in journaling and auditing keep track of actions taken to all documents in the repository. Additional features make finding documents quick and easy.

For specifics on all of the features and processes available through the Position Control Request project, review the ***Position Control Request (PCR) – Process Handbook*** for details.