

WORKFLOW TOOLS

FileRoom Add-In Guide

Last updated February 2016

© THOMSON REUTERS 2016. ALL RIGHTS RESERVED.

Thomson Reuters disclaims any and all liability arising from the use of this document and does not guarantee that any information contained herein is accurate or complete. This document contains information proprietary to Thomson Reuters and may not be reproduced, transmitted, or distributed in whole or part without the express written permission of Thomson Reuters.

Acknowledgment is made to all other brand or product names referred to in the text that are registered trademarks, trademarks, or trade names of their respective owners.

TABLE OF CONTENTS

LEARNING ABOUT THE FILEROOM ADD-IN.....	5
Adobe Acrobat component	5
Microsoft Office component	5
Microsoft Outlook component	5
Control Panel component	5
Additional features	6
System requirements	6
INSTALLING THE MICROSOFT .NET FRAMEWORK 4.0	7
INSTALLING THE FILEROOM ADD-IN.....	12
OPENING THE CONTROL PANEL COMPONENT	19
ADDING DOCUMENTS FROM YOUR DESKTOP	20
Adding documents to a drawer	21
Adding documents to a workflow	22
ADDING DOCUMENTS FROM MICROSOFT WORD AND EXCEL	24
Saving changes to documents.....	25
Using the “Version Control” feature	25
ADDING PDF FILES FROM ADOBE ACROBAT	27
PRINTING TO FILEROOM	28
Saving web pages to FileRoom	29
ADDING EMAIL MESSAGES TO FILEROOM FROM OUTLOOK.....	31
Importing an email message as a single file	31
Importing an email message and attachments as separate files	32
Working with outgoing email messages.....	33
USING THE FILEROOM ADD-IN TO MODIFY PDF FILES.....	35
Learning about the Acrobat FileRoom TaxTools menu	35
Learning about FileRoom-specific Acrobat tools	35
Learning about ScanFlow Acrobat tools	35
Learning about TaxSort Acrobat tools	36
EDITING PDF FILES USING THE ACROBAT TOOLBAR	37
Using the Acrobat Annotations tools.....	37
Saving and deleting annotations	38
Viewing the Comments List section.....	38
Searching for text in a PDF file	38

TROUBLESHOOTING.....	40
Working with a proxy server.....	40
Configuring toolbars to appear in Adobe Acrobat.....	41

LEARNING ABOUT THE FILEROOM ADD-IN

The FileRoom Add-In is the prerequisite for all other Add-Ins, and includes functionality for Adobe Acrobat, Microsoft Word and Excel, and Microsoft Outlook.

The FileRoom Add-In will remove previous versions of this Add-In prior to installation. It includes InstallShield's Update Service client, which facilitates the installation of patches and updates to all Add-Ins. It also includes a component for Control Panel.

ADOBE ACROBAT COMPONENT

The Adobe Acrobat component of the FileRoom Add-In allows you to

- Add and view Adobe Acrobat annotations in stored PDF files
- Edit stored PDF files (e.g., insert and delete pages, edit bookmarks)
- Upload local PDF files by clicking the **Add to FileRoom** button on the Adobe Acrobat toolbar
- Use stamps and accounting tick marks for reviewing documents online
- Track and save multiple versions of the same document (if this feature is enabled for you)

MICROSOFT OFFICE COMPONENT

The Microsoft Office component of the FileRoom Add-In allows you to

- Edit stored Microsoft Word and Excel files
- Add Microsoft Word and Excel files from the respective Microsoft Office application
- Track and save multiple versions of the same document (if this feature is enabled for you)
- Retrieve documents from FileRoom
- Retrieve the 10 most recent documents accessed by using the **Recent Documents** drop-down list
- Store files offline for extended use of the document

MICROSOFT OUTLOOK COMPONENT

The Microsoft Outlook component of the FileRoom Add-In allows you to

- Email documents using Microsoft Outlook
- Save incoming and outgoing email messages and attachments (requires the Upload Documents Service Add-In)

CONTROL PANEL COMPONENT

The Control Panel component of the FileRoom Add-In allows you to

- Add a single file, multiple files, or an entire folder to FileRoom by dragging and dropping the files or folders on a desktop shortcut

- Add a single email message or multiple email messages by dragging the messages to your Microsoft Outlook FileRoom folder
NOTE: To use this functionality within Microsoft Outlook 2010 64-bit, click the Windows **Start** button, then select **All Programs**, then **Thomson Reuters**, then **FileRoom**, then select **Enable Control Panel Outlook Integration**.
- Perform uploads in Silent mode. Send to FileRoom profiles can be configured to run in Interactive or Silent mode. When you enable Silent mode, an indexing window will not appear when uploading files to FileRoom.
- Monitor the status of uploaded files
- View uploaded files
- Maintain your files, other than Word, Excel, and PDF, that are currently checked out for editing from FileRoom

ADDITIONAL FEATURES

Additional features included in this Add-In include the following:

- **Print to FileRoom** functionality uses the **Print** option from any application to upload documents as PDF files
- Windows Explorer **Send To** option facilitates a quick import of documents
- **Save to FileRoom** shortcut is added to your desktop
- Right-click option is available to send documents

SYSTEM REQUIREMENTS

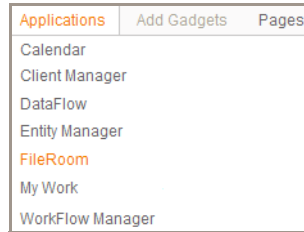
For more information regarding the current system requirements for the FileRoom Add-In and other WorkFlow Tools applications, please refer to the *System Requirements* document available from the following locations:

- Platform **Help** menu (select **Help**, then select **System Requirements**)
- Product Assistance
- Release Notes gadget

INSTALLING THE MICROSOFT .NET FRAMEWORK 4.0

Prior to downloading and installing the FileRoom Add-In, you must install the Microsoft .NET Framework 4.0 on the server that will be the centralized upload location. To do so, complete the following steps.

- 1 Log in to the ONESOURCE platform.
- 2 From the **Applications** menu, select **Applications**, then select **FileRoom**.



The main FileRoom page appears.

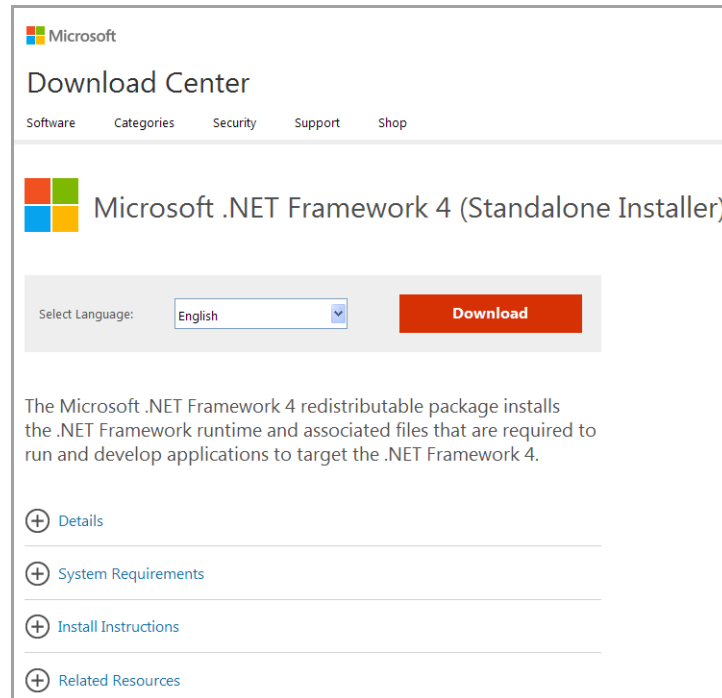


3 Click **Add-Ins**. The **Add-Ins** page appears.

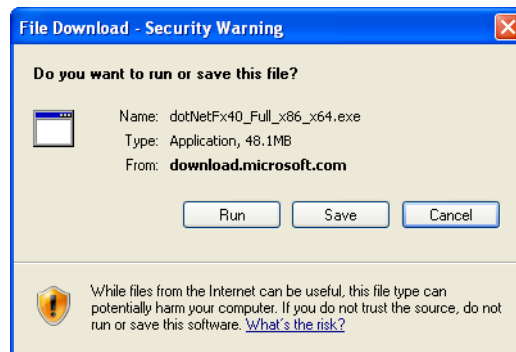
The screenshot shows the FileRoom web interface. At the top, there is a navigation bar with the FileRoom logo and Thomson Reuters branding. Below the navigation bar, there is a section titled "Add-Ins" with a green plus icon. This section contains instructions on how to install add-ins and a link to installation instructions. The main content is a table titled "LIST OF ADD-INS TO DOWNLOAD" with five rows, each representing a different add-in. Each row includes the add-in name, version, a brief description, a link to installation instructions, and a "DOWNLOAD" button.

LIST OF ADD-INS TO DOWNLOAD	
<p>FileRoom Add-In</p> <p>Version 10.0.0</p> <p>This add-in includes productivity tools and integration with Microsoft Outlook, Lotus Notes, Microsoft Office, and Adobe Acrobat.</p> <p>Installation Instructions</p> <p>Microsoft .NET Framework 4.0 (for 32 bit and 64 bit operating systems)</p>	<p>DOWNLOAD</p>
<p>FormsFlow Add-In</p> <p>Version 3.8</p> <p>This add-in allows you to design and create your DataFlow workbook in Microsoft Excel.</p>	<p>DOWNLOAD</p>
<p>DataFlow Add-In</p> <p>Version 3.8</p> <p>This add-in allows you to extract data from your DataFlow request database using Microsoft Excel.</p>	<p>DOWNLOAD</p>
<p>ScanFlow Add-In</p> <p>Version 8.3</p> <p>This add-in allows you to upload documents in batches with the use of barcode cover sheets.</p> <p>Installation Instructions</p>	<p>DOWNLOAD</p>
<p>Upload Service</p> <p>Version 6.2</p> <p>This add-in allows for a centralized location for uploading documents and must be used for ScanFlow, Microsoft Outlook, and Lotus Notes.</p> <p>Installation Instructions</p> <p>Microsoft .NET Framework 1.1</p>	<p>DOWNLOAD</p>

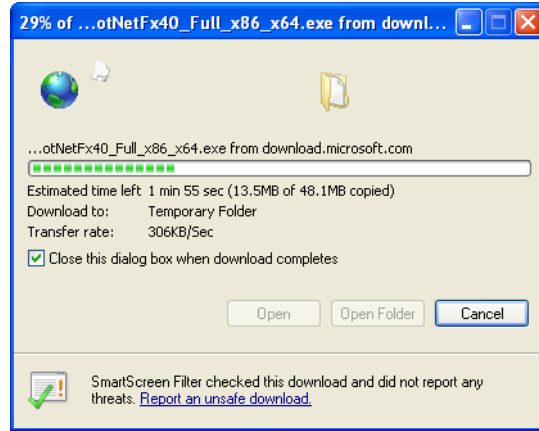
4 In the **List of Add-ins to Download**, locate the **FileRoom Add-In** section, then click the **Microsoft .NET Framework 4.0** link. The **Microsoft Download Center** page for Microsoft .NET Framework Version 4.0 appears.



- 5 Click **Download**. The **File Download - Security Warning** dialog box appears, and asks if you want to run or save the file.



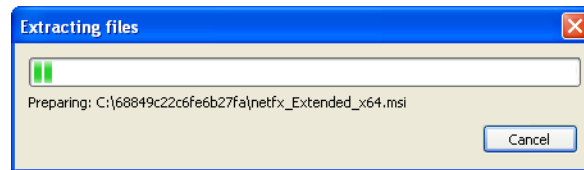
- 6 Click **Run** to download the file and start the installation process. The download's progress appears in a dialog box.



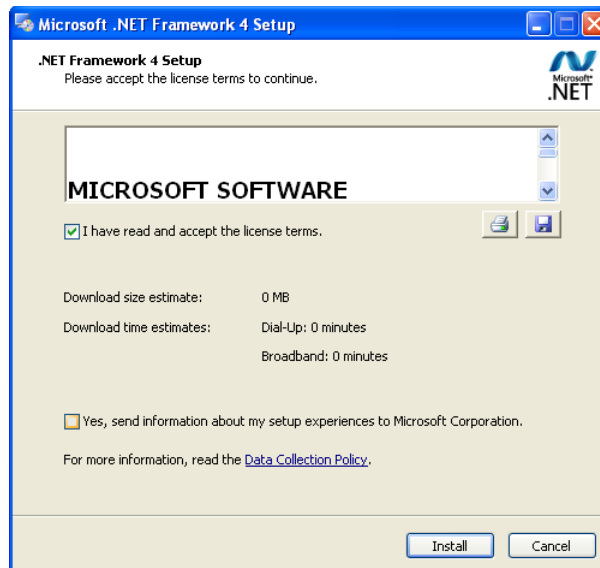
NOTE: A **Security Warning** dialog box may appear, depending on your computer's security settings. Click **Run** to begin installing the .NET 4.0 Framework.



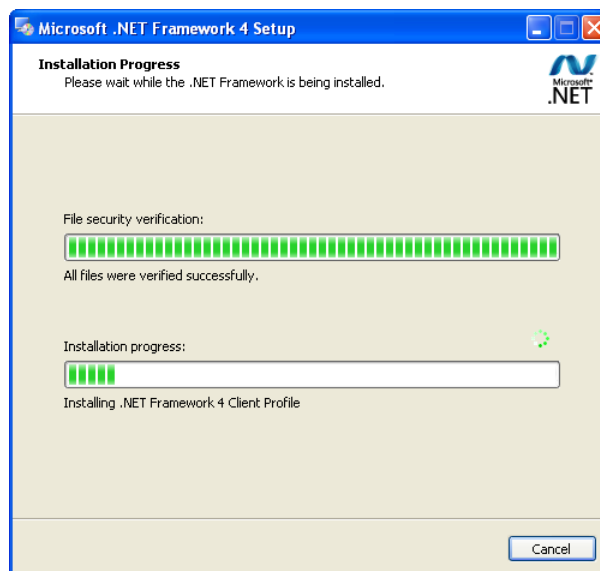
A series of dialog boxes appears, including the **Extracting files** dialog box.



- 7 In the **Microsoft .NET Framework 4 Setup** dialog box, select the **I have read and accept the license terms** check box, then click **Install**.



The installation progress appears in a separate dialog box.



- 8 When the installation is complete, click **Finish**.

INSTALLING THE FILEROOM ADD-IN

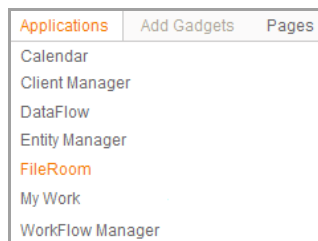
Before you begin installing the FileRoom Add-In, make sure that you have installed the Microsoft .NET Framework 4.0. This Framework for 32-bit and 64-bit operating systems is required.

IMPORTANT!

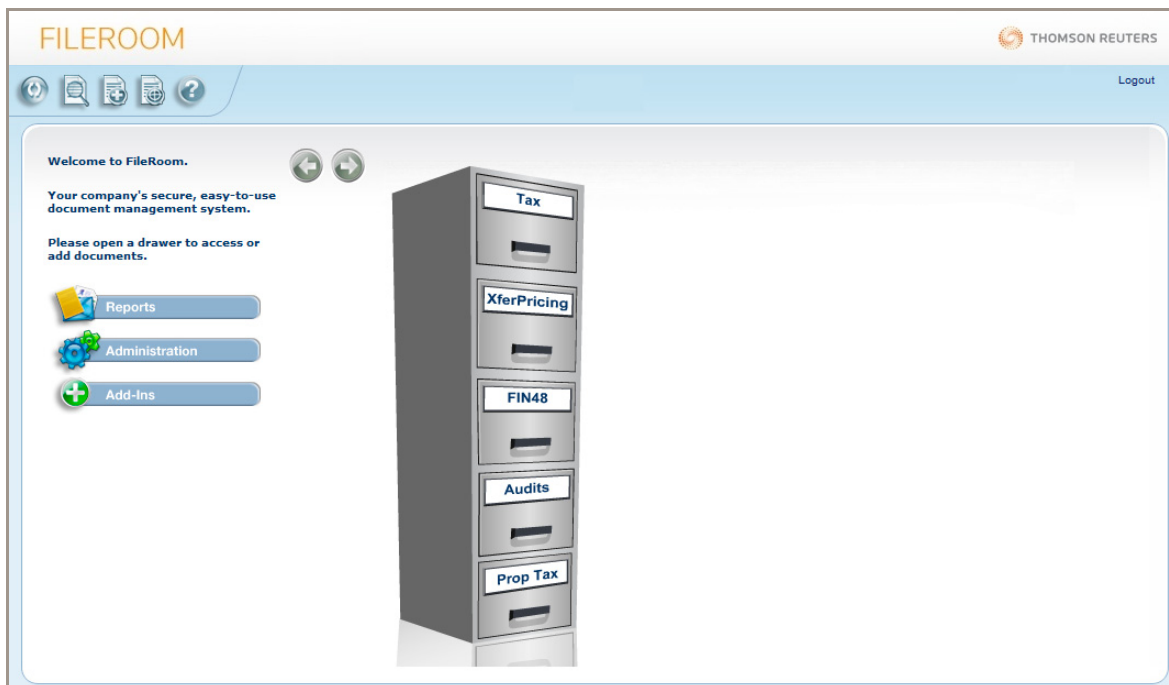
- If multiple users share the same computer, the FileRoom Add-In must be installed under each network profile.
- Make sure that you do not have Adobe Reader installed on your computer when downloading and installing the FileRoom Add-In. If you do have Adobe Reader installed, please remove it, then proceed with the FileRoom Add-In installation.

To install the FileRoom Add-In, complete the following steps.

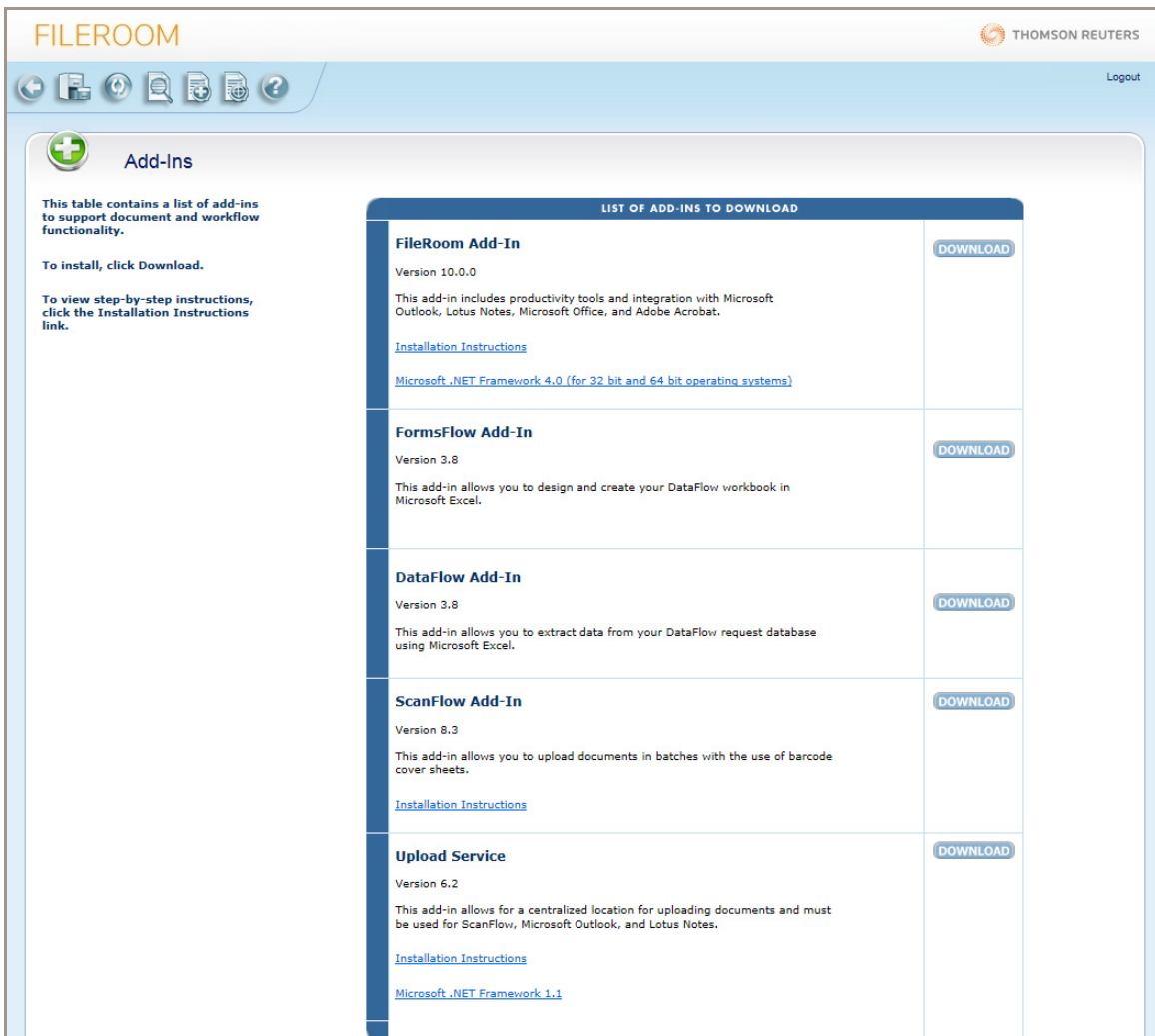
- 1 Log in to the ONESOURCE platform.
- 2 From the **Applications** menu, select **Applications**, then select **FileRoom**.



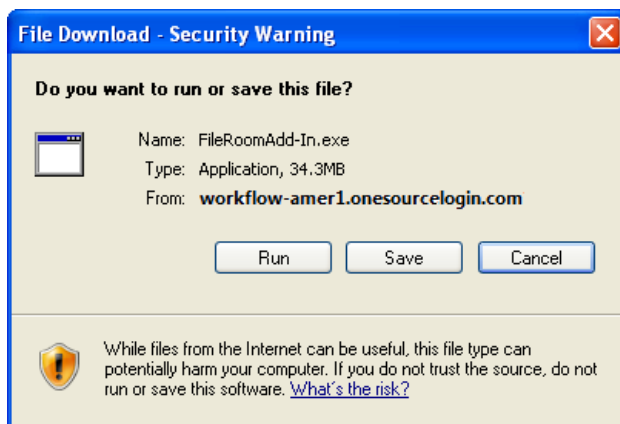
The main FileRoom page appears.



- 3 Click **Add-Ins**. The **Add-Ins** page appears.

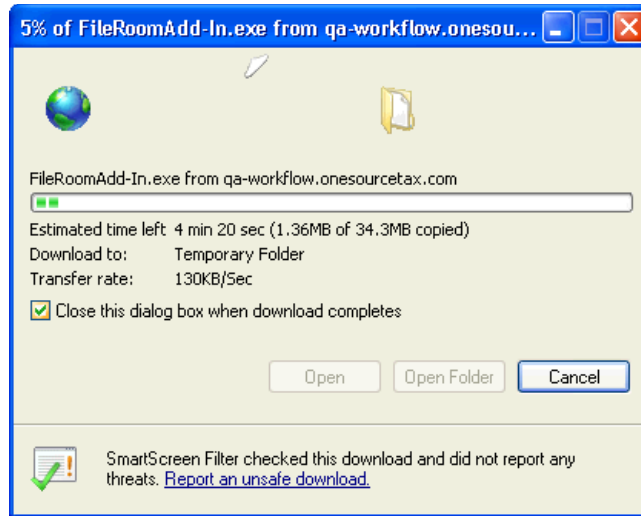


- In the **List of Add-ins to Download**, locate the **FileRoom Add-In** section, then click **Download**. The **File Download - Security Warning** dialog box appears, and asks if you want to run or save the file.



NOTE: The dialog boxes that appear during your installation process may differ according to the version of your operating system.

- 5 Click **Run** to download the file and start the installation process. The download's progress appears in a dialog box.



NOTE: A **Security Warning** dialog box may appear, depending on your computer's security settings. Click **Run** to begin installing the FileRoom Add-In.



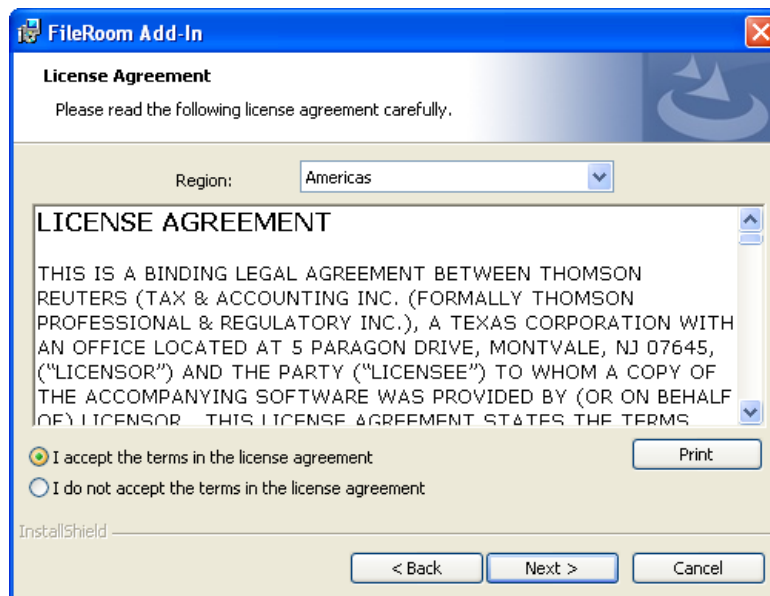
The **Preparing to Install** window appears.



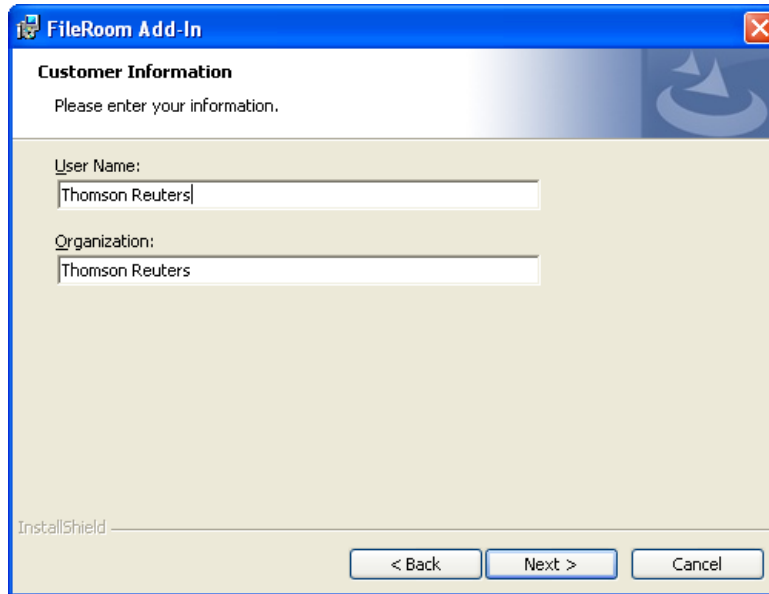
The Installation Wizard begins.



- 6 Click **Next** to continue the installation. The **License Agreement** dialog box appears.

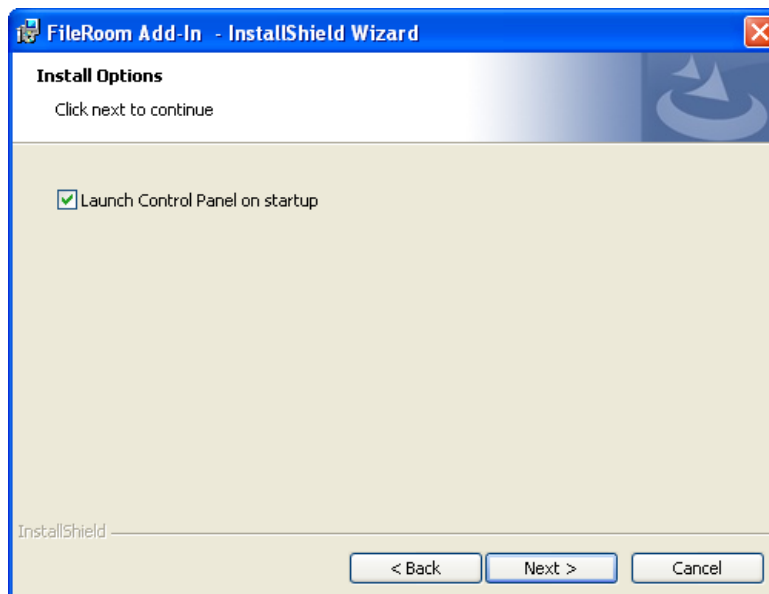


- 7 Review the Add-In license agreement. Then, select your region and select the **Accept the terms** option. Click **Next**. The **Customer Information** dialog box appears.



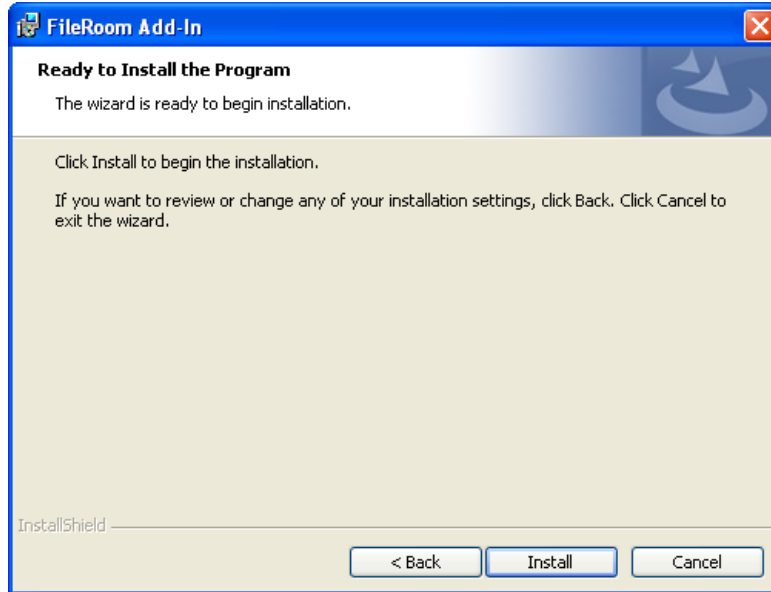
The screenshot shows a dialog box titled "FileRoom Add-In" with a blue header bar. Below the header, the text "Customer Information" is displayed in bold, followed by the instruction "Please enter your information." There are two text input fields: "User Name:" with the text "Thomson Reuters" and "Organization:" with the text "Thomson Reuters". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

- 8 Type your name and organization, then click **Next**. The **Install Options** dialog box appears.

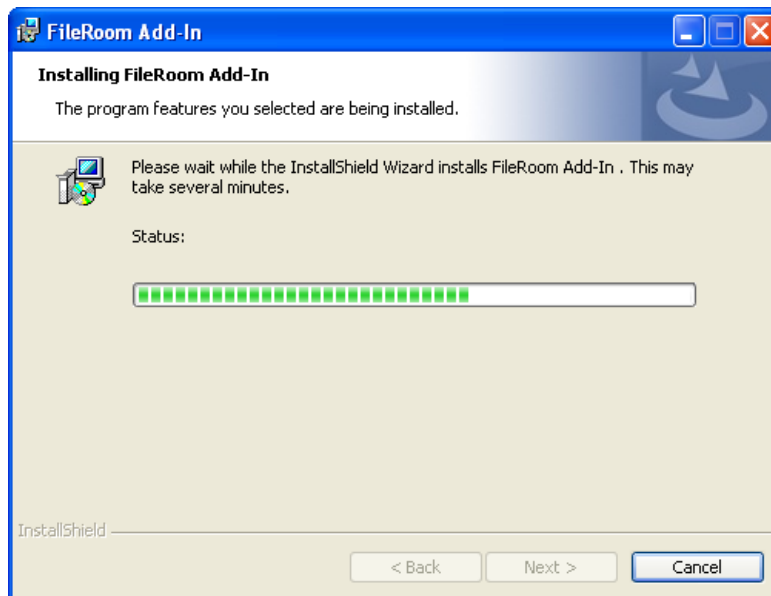


The screenshot shows a dialog box titled "FileRoom Add-In - InstallShield Wizard" with a blue header bar. Below the header, the text "Install Options" is displayed in bold, followed by the instruction "Click next to continue". There is a single checked checkbox labeled "Launch Control Panel on startup". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

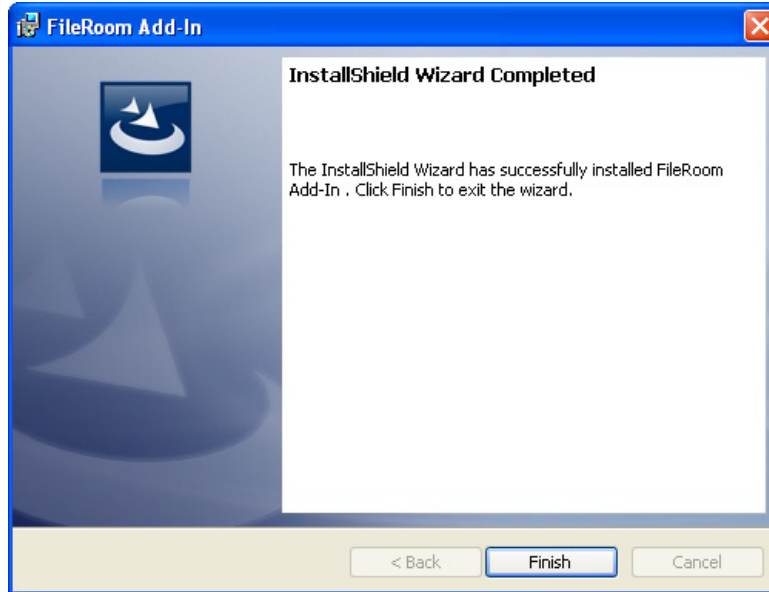
- NOTE:** Select the **Launch Control Panel on startup** check box if appropriate.
- 9 Click **Next**. The **Ready to Install the Program** dialog box appears.



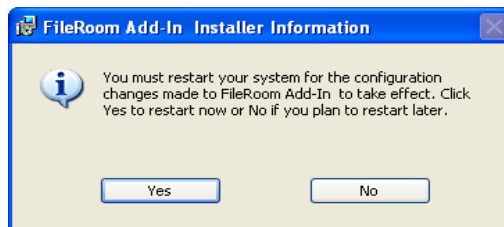
- 10 Click **Install** to begin the software installation. The **Installing FileRoom Add-In** dialog box appears and shows the progress of the installation.



The **InstallShield Wizard Complete** dialog box appears.



- 11 Click **Finish**. The **FileRoom Add-In Installer Information** dialog box appears, and tells you to restart your system to complete the configuration changes.

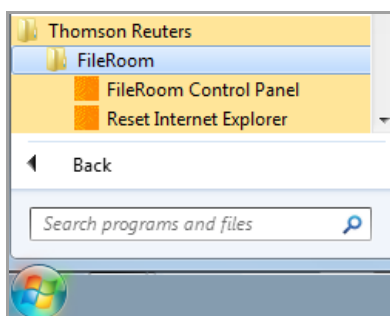


- 12 Click **Yes** to restart your computer immediately or click **No** to restart your computer at a later time.

OPENING THE CONTROL PANEL COMPONENT

To open the Control Panel component of the FileRoom Add-In, complete one of the following actions:

- Double-click a profile shortcut on your desktop.
- Click the Windows **Start** button, then select **All Programs**, then **Thomson Reuters**, then **FileRoom**, then select **FileRoom Control Panel**.

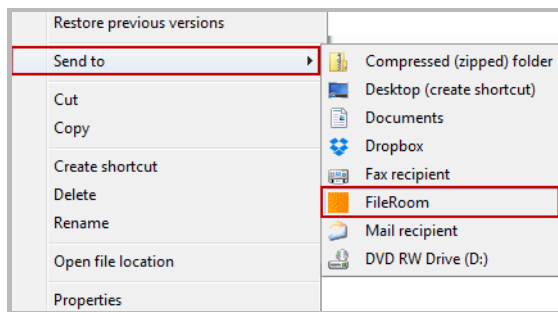


NOTE: If you are prompted to enter a login ID and password and you access FileRoom through ONESOURCE, use your ONESOURCE login and password credentials to access the Control Panel component.

ADDING DOCUMENTS FROM YOUR DESKTOP

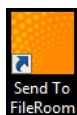
You can add documents to FileRoom or a specific workflow without going through the file cabinet. To do so, locate the file on your system that you want to add, then do one of the following:

- Right-click the file name, select **Send To**, then select **FileRoom**.



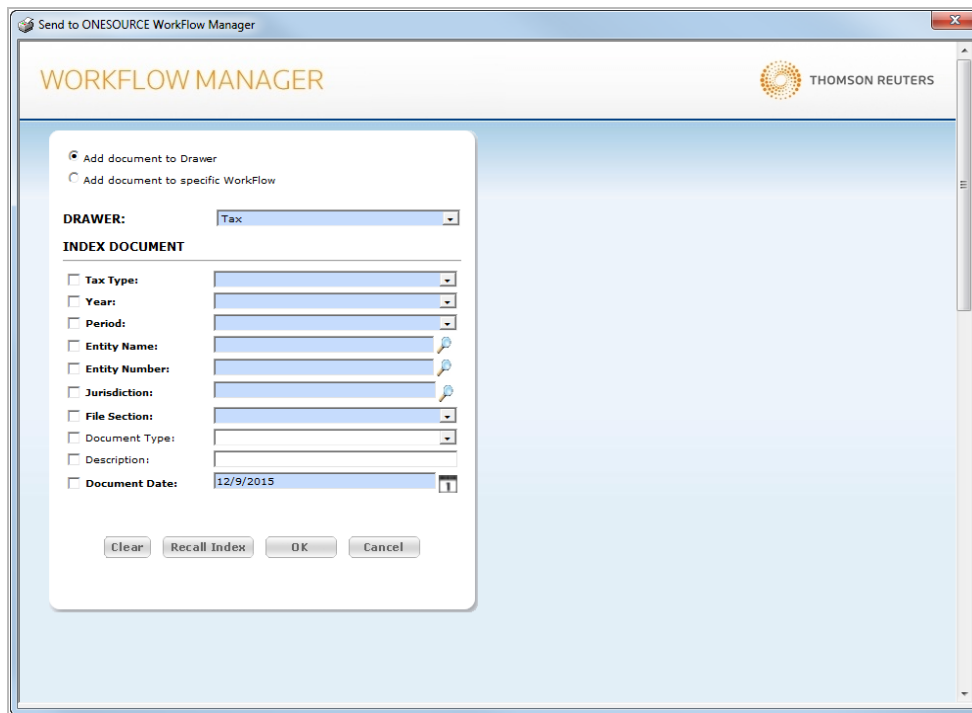
OR

- Drag-and-drop the file name onto the **Send to FileRoom** shortcut on your desktop.



The **Send to ONESOURCE WorkFlow Manager** window appears, and includes options for

- > Adding your document to a drawer
- > Adding a document to a specific workflow



NOTE: If you are not logged in to Control Panel, the **ONESOURCE WorkFlow Manager Login** dialog box may appear. If so, type your ONESOURCE login information in the **Login** and **Password** fields, then click **Login**.

ADDING DOCUMENTS TO A DRAWER

To add a document to a drawer from your desktop, complete the following steps.

- 1 In the **Send to ONESOURCE WorkFlow Manager** window, select the **Add document to Drawer** option.

- 2 From the drop-down menu, select a drawer. The index fields that appear are relevant to the selected drawer.
- 3 Complete the information in each index field. Bold fields are required.
 - Click **Clear** to delete all data in the index fields and re-enter data.
 - Click **Recall Index** to recall the last values entered, then make changes as needed.
- 4 Click **OK** to save your document as indexed or click **Cancel** to exit without saving.

ADDING DOCUMENTS TO A WORKFLOW

To add a document to a workflow from your desktop, complete the following steps.

- 1 In the **Send to ONESOURCE WorkFlow Manager** window, select the **Add document to specific WorkFlow** option. A wizard begins, allowing you to select a specific workflow for your document.

Send to ONESOURCE WorkFlow Manager

WORKFLOW MANAGER

THOMSON REUTERS

Add document to Drawer
 Add document to specific WorkFlow

Find WorkFlow (Step 1 of 3)
Enter search criteria to find the workflow you will add your document to.

DRAWER: Tax

FOLDER CRITERIA

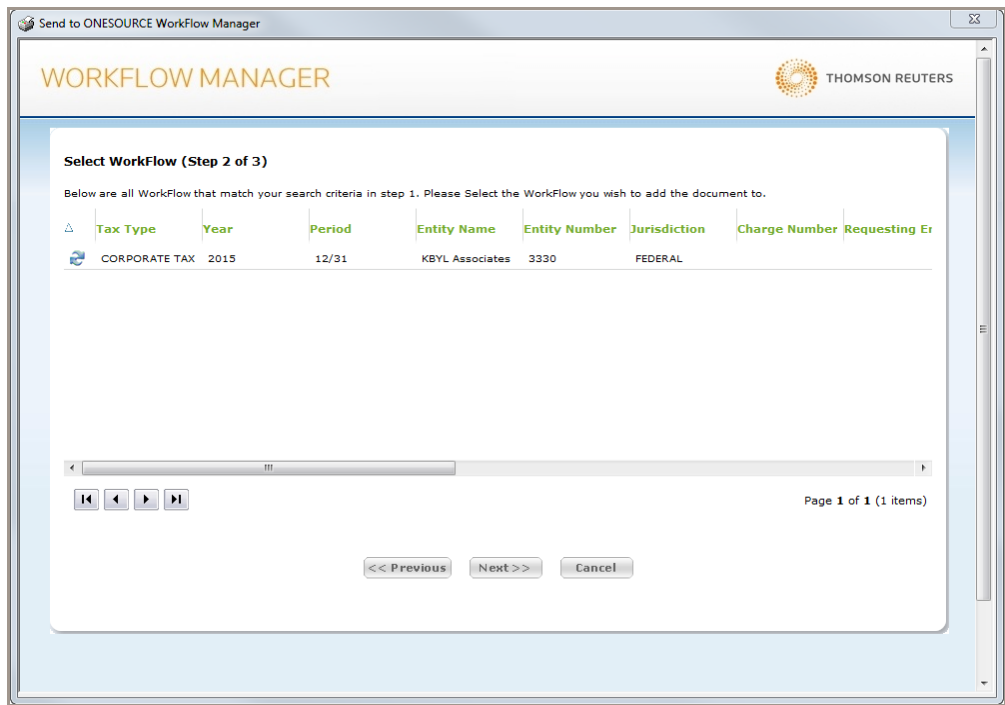
Tax Type: ALL
 Year: ALL
 Period: ALL

WORKFLOW CRITERIA

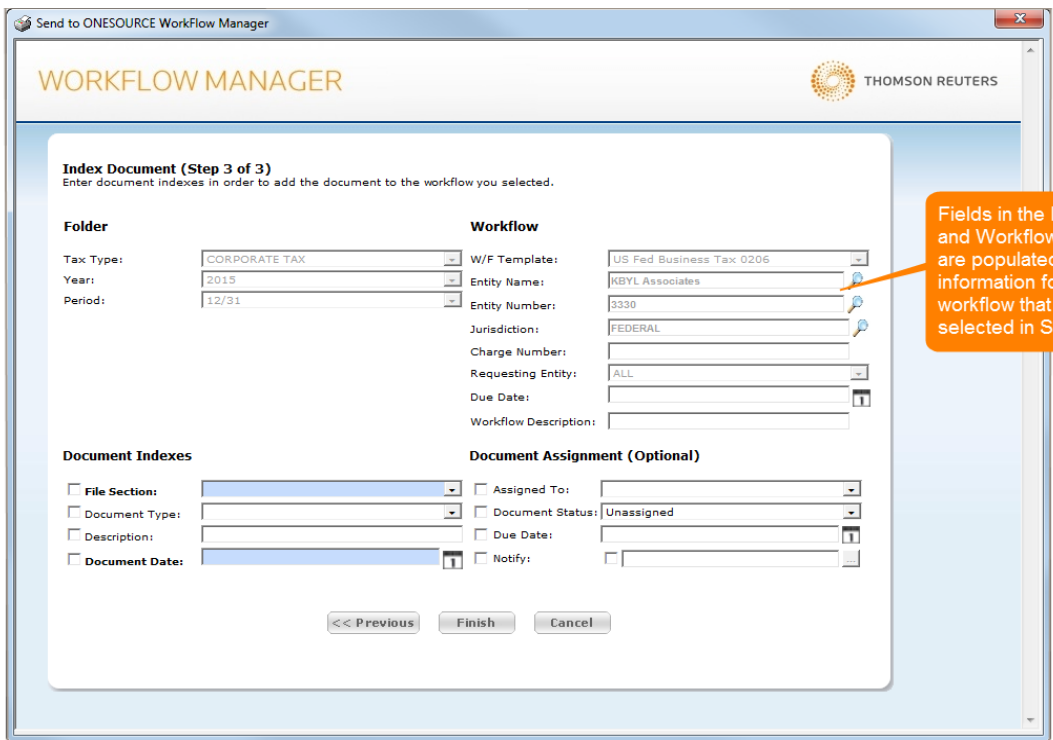
Entity Name:
 Entity Number:
 Jurisdiction:
 Charge Number:
 Requesting Entity: ALL

Clear Recall Workflow Next >> Cancel

- 2 In Step 1 of the wizard, select a drawer, then complete the information in the **Folder Criteria** and **Workflow Criteria** sections.
- 3 Click **Next**. The **Select WorkFlow (Step 2 of 3)** window appears. Any workflows that meet the criteria specified in Step 1 appear.



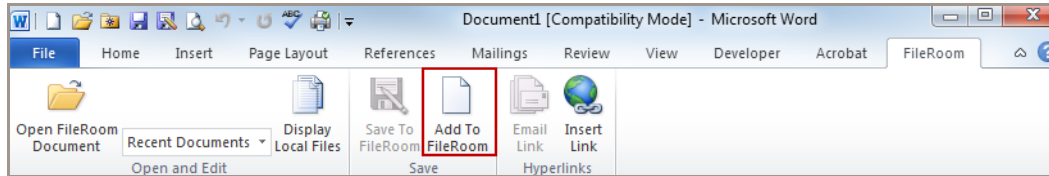
- 4 In the **Select WorkFlow (Step 2 of 3)** window, select the workflow to which your document will be assigned, then click **Next**. The **Index Document (Step 3 of 3)** window appears.



- 5 In the **Index Document (Step 3 of 3)** window, complete the fields in the **Document Indexes** and **Document Assignment** sections as required, then click **Finish** to save the document to the workflow.

ADDING DOCUMENTS FROM MICROSOFT WORD AND EXCEL

You can add documents to FileRoom directly from Microsoft Word and Excel by clicking **Add To FileRoom** on the **FileRoom** tab of the Word and Excel ribbons as shown in the example below.



To add a document to FileRoom from Word or Excel, complete the following steps.

- 1 Open a new Word or Excel document.
- 2 From the **FileRoom** tab, click **Add to FileRoom**. The **Index Documents** window appears.

 A screenshot of the 'Index Documents' dialog box. The window title is 'Index Documents' and it features the Thomson Reuters logo. There are two radio buttons: 'Add document to Drawer' (selected) and 'Add document to specific Workflow'. Below this is a 'DRAWER:' dropdown menu set to 'Tax'. Under the heading 'INDEX DOCUMENT', there are several fields with checkboxes: 'Tax Type:', 'Year:', 'Period:', 'Entity Name:', 'Entity Number:', 'Jurisdiction:', 'File Section:', 'Document Type:', 'Description:', and 'Document Date:'. The 'Document Date' field is populated with '1/12/2016'. At the bottom are buttons for 'Clear', 'Recall Index', 'OK', and 'Cancel'.

- NOTE:** If you are not logged in to FileRoom, a **Login** dialog box appears first where you can enter your ONESOURCE login ID and password. After logging in to FileRoom, the **Index Documents** window appears.
- 3 Select an option for adding your document to FileRoom, then complete any required fields that appear in blue.
 - 4 Click **OK**. The document is added to FileRoom, and remains open on your computer. The title of the document appears with the FileRoom index values that you created, similar to the following example.



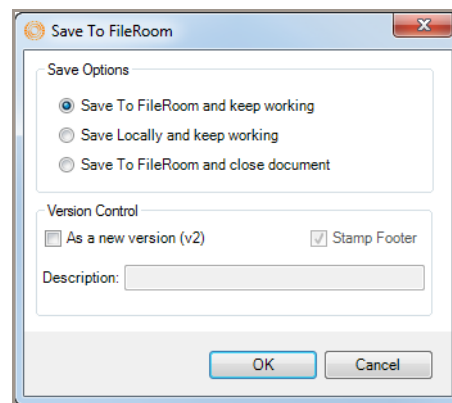
NOTE: If you are not working on the document that you saved to FileRoom, the title bar will revert to the title of the document and no index values will appear.

SAVING CHANGES TO DOCUMENTS

After you add a document to FileRoom, the Word or Excel document exists in FileRoom as well as on your local system. Any changes that you make to this document going forward can be saved in FileRoom or through Word or Excel on your system.

To save changes to a FileRoom document, complete the following steps.

- 1 Within Word or Excel, click the **FileRoom** tab, then click **Save To FileRoom**. The **Save To FileRoom** dialog box appears.



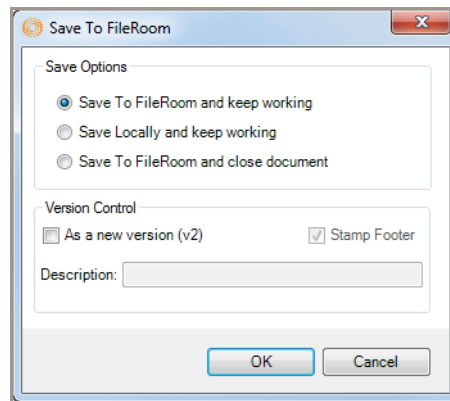
- 2 Select a save option. You can select from the following options:
 - **Save To FileRoom and keep working:** Select this option to save your changes to FileRoom while keeping the document open.
 - **Save Locally and keep working:** Select this option to save your changes to Word or Excel on your system while keeping the document open. The document now appears as “checked out” in FileRoom. While checked out, other users can view the document in read-only mode. Save the document to FileRoom to check in the document.
 - **Save To FileRoom and close document:** Select this option to save your changes to FileRoom and close the document.
- 3 Click **OK**.

USING THE “VERSION CONTROL” FEATURE

If your administrator has enabled the “Version Control” feature for the drawer that you are working in, FileRoom will allow you to save different versions of the same document. The different versions will include sequential version numbers to set them apart.

To use version control for an open document, complete the following steps.

- 1 Within Word or Excel, click the **FileRoom** tab, then click **Save To FileRoom**. The **Save To FileRoom** dialog box appears.

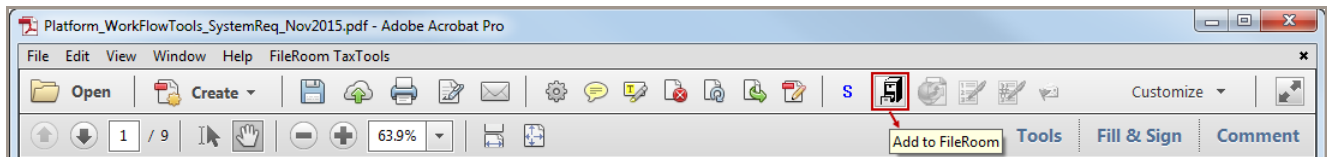


- 2 In the **Save Options** section, select **Save To FileRoom and keep working** or **Save To FileRoom and close document**.
- 3 In the **Version Control** section, select the **As a new version** check box.
NOTE: Select the **Stamp Footer** check box to add a footer to the bottom of the document.
- 4 In the **Description** field, type a description of this version of the document.
- 5 Click **Save**.

ADDING PDF FILES FROM ADOBE ACROBAT

You can add documents to FileRoom directly from Adobe Acrobat. To do so, complete the following steps.

- 1 Open Adobe Acrobat, then open the PDF file that you wish to add.
- 2 From the Acrobat toolbar, click the file cabinet icon.



NOTE: If you do not see the icon, click the gear icon on the toolbar to edit the current tool set, then add the FileRoom icons to the toolbar.

The **Add to ONESOURCE WorkFlow Manager** window appears.

 A screenshot of the 'ADD TO ONESOURCE WORKFLOW MANAGER' dialog box. The window title is 'ADD TO ONESOURCE WORKFLOW MANAGER'. The header area contains 'WORKFLOW MANAGER' and the Thomson Reuters logo. The dialog has two radio buttons: 'Add document to Drawer' (selected) and 'Add document to specific WorkFlow'. Below this is a 'DRAWER:' dropdown menu set to 'Tax'. Under the 'INDEX DOCUMENT' section, there are several fields: 'Tax Type:' (checked, dropdown set to 'FEDERAL INCOME'), 'Year:' (checked, dropdown), 'Period:' (unchecked, dropdown), 'Entity Name:' (unchecked, text input), 'Entity Number:' (unchecked, text input), 'Jurisdiction:' (unchecked, text input), 'File Section:' (unchecked, dropdown), 'Document Type:' (unchecked, dropdown), 'Description:' (unchecked, text input), and 'Document Date:' (unchecked, text input set to '1/13/2016'). At the bottom are buttons for 'Clear', 'Recall Index', 'OK', and 'Cancel'.

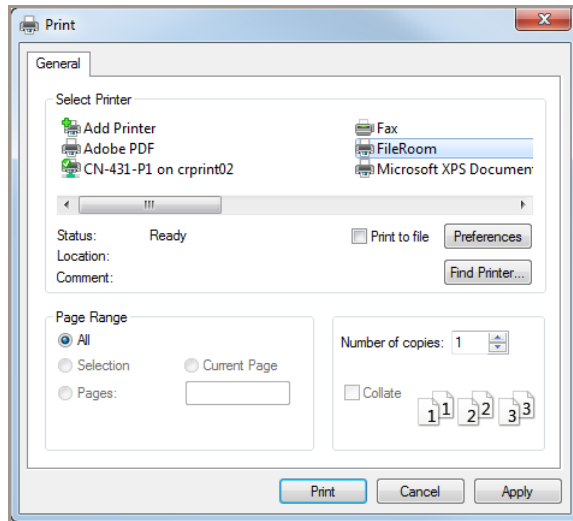
- 3 Select an option for adding your document to FileRoom, then complete any required fields that appear in blue.
- 4 Click **OK**. The document is added to FileRoom.

PRINTING TO FILEROOM

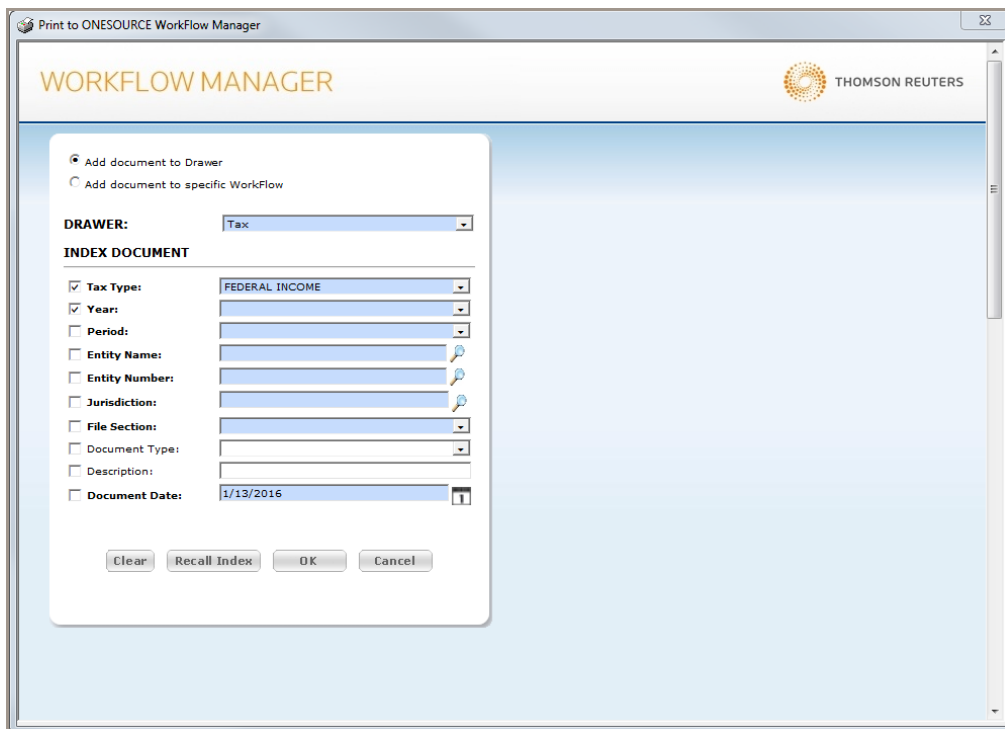
You can add documents created in programs other than Word, Excel, Acrobat, or Outlook using the **Print to FileRoom** option. Selecting this option prints the document to a PDF file, which is then added to FileRoom.

To print a document to FileRoom, complete the following steps.

- 1 From the **File** menu, select **Print**. The **Print** dialog box appears.



- 2 In the **Select Printer** section of the **General** tab, select **FileRoom**, then click **Print**. The **Print to ONESOURCE WorkFlow Manager** window appears.

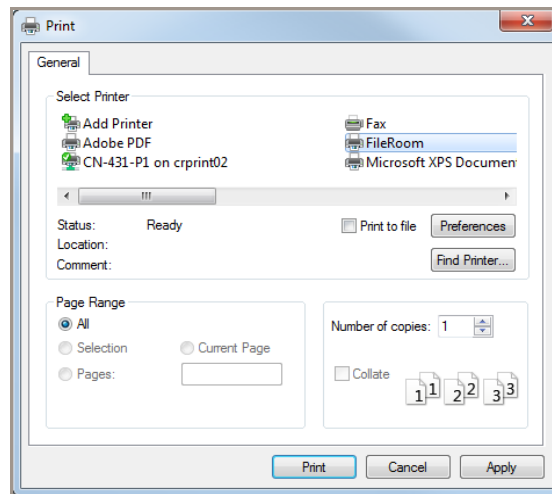


- 3 Select an option for adding your document to FileRoom, then complete any required fields that appear in blue.
- 4 Click **OK**. The document is added to FileRoom.

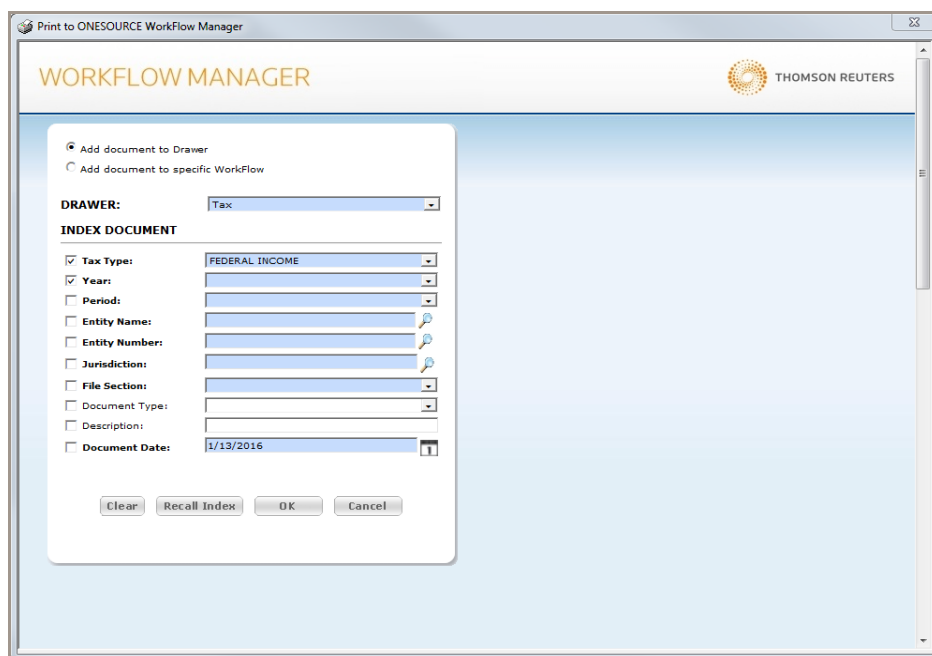
SAVING WEB PAGES TO FILEROOM

Occasionally, you may wish to save a web page to FileRoom without converting the page to a PDF file. To do so, complete the following steps.

- 1 Open the web page that you wish to save to FileRoom.
- 2 From the **File** menu, select **Print**. The **Print** dialog box appears.



- 3 In the **Select Printer** section of the **General** tab, select **FileRoom**, then click **Print**. The **Print to ONESOURCE WorkFlow Manager** window appears.



- 4 Select an option for adding your document to FileRoom, then complete any required fields that appear in blue.
- 5 Click **OK**. The web page is added to FileRoom.

ADDING EMAIL MESSAGES TO FILEROOM FROM OUTLOOK

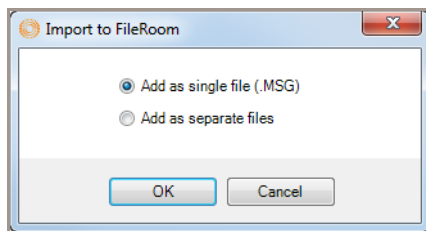
You can import email messages from Microsoft Outlook to FileRoom. Email messages retain their characteristics after you import them to FileRoom, allowing you to perform all normal email functions such as replying, forwarding, or viewing recipient lists.

When you import an email message, you can select to add the email and any attachments as a single file or as separate files. For example, suppose that you want to import an email message that has two attachments. You can either import the email messages and the attachments as one file or as three separate files (the message body plus the two attachments).

IMPORTING AN EMAIL MESSAGE AS A SINGLE FILE

To import an existing email message and attachments as a single file, complete the following steps.

- 1 In Outlook, open the email message that you wish to add.
- 2 From the **FileRoom** tab, click the **Add to FileRoom** icon. The **Import to FileRoom** dialog box appears.



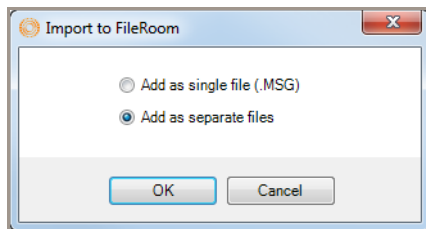
- 3 Select the **Add as single file (MSG)** option. Select this option to import the email message and all attachments as one document.
- 4 Click **OK**. The **Index Documents** dialog box appears.

- 5 Select a drawer, then complete the index fields as appropriate, then click **Save**. A confirmation appears and the import process begins.

IMPORTING AN EMAIL MESSAGE AND ATTACHMENTS AS SEPARATE FILES

To import an existing email message and attachments as separate files, complete the following steps.

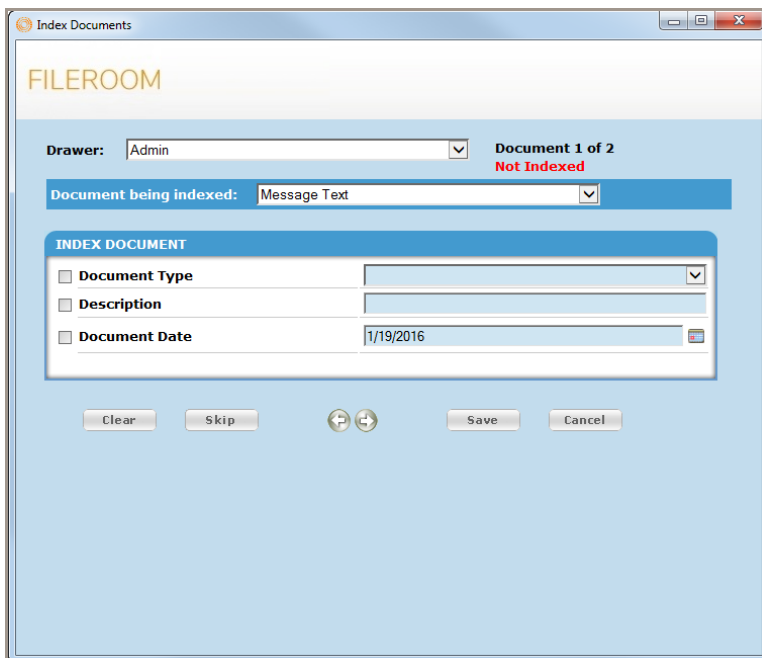
- 1 In Outlook, open the email message that you wish to add.
- 2 From the **FileRoom** tab, click the **Add to FileRoom** icon. The **Import to FileRoom** dialog box appears.



- 3 Select the **Add as separate files** option. Select this option to import the email message and all attachments as separate indexed documents.

EXAMPLE: You could import and index the message as “correspondence” then index the attachments as “client research”.

- 4 Click **OK**. The **Index Documents** dialog box appears.



- 5 Select a drawer, then select the document to index from the **Document being indexed** list.
- 6 Complete the index fields as appropriate, then click the right arrow. Click **Skip** to skip a document without saving it to FileRoom.

IMPORTANT! If you click **Save**, FileRoom will import and index the selected document only, and will not import or index any other documents.

- 7 Repeat steps 6-7 for each document that you want to import.
- 8 Click **Save**. A confirmation appears and the import process begins

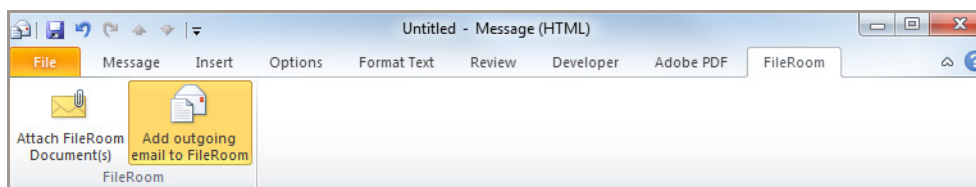
WORKING WITH OUTGOING EMAIL MESSAGES

You can add outgoing emails directly to FileRoom, as well as attach an existing FileRoom document to an outgoing email message.

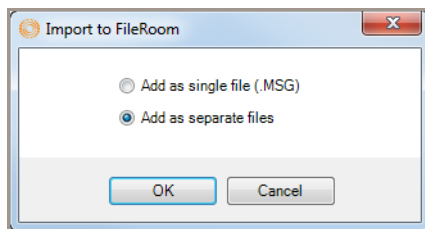
ADDING OUTGOING EMAILS DIRECTLY TO FILEROOM

To add an outgoing email directly to FileRoom, complete the following steps.

- 1 Compose a new email message.
- 2 From the **FileRoom** tab, click the **Add outgoing email to FileRoom** icon.



- 3 Send the email. The **Import to FileRoom** dialog box appears.

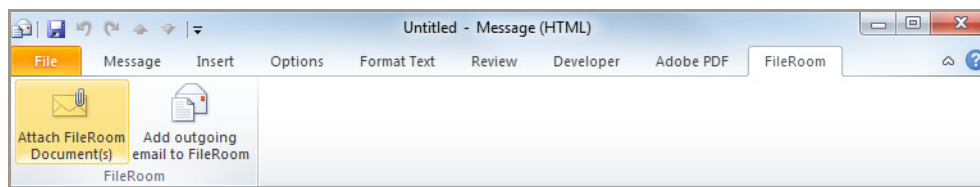


- 4 Select an option for importing the email message.
 - Select the **Add as single file (MSG)** option to import the email message and all attachments as one document.
 - Select the **Add as separate files** option to import the email message and all attachments as separate indexed documents.
- 5 Click **OK**. The **Index Documents** dialog box appears.
- 6 Select a drawer, then complete the index fields as appropriate, then click **Save**. A confirmation appears and the import process begins.

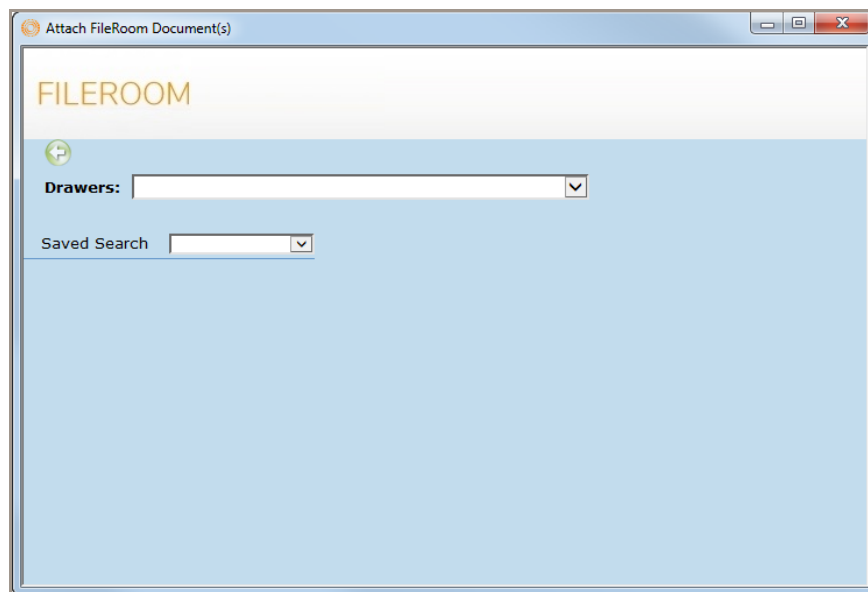
ATTACHING A FILEROOM DOCUMENT TO AN OUTGOING EMAIL MESSAGE

To attach a FileRoom document to an outgoing email message, complete the following steps.

- 1 Compose a new email message.
- 2 From the **FileRoom** tab, click the **Attach FileRoom Document(s)** icon.



The **Attach FileRoom Document(s)** window appears.



- 3 Select a drawer, then complete the index fields as appropriate, then click **Save**. A confirmation appears and the import process begins.

USING THE FILEROOM ADD-IN TO MODIFY PDF FILES

After installing the FileRoom Add-In, Adobe Acrobat provides an enhanced selection of tools both on the Acrobat toolbar and within the **FileRoom TaxTools** menu.

LEARNING ABOUT THE ACROBAT FILEROOM TAXTOOLS MENU




The **FileRoom TaxTools** menu includes the following options:

- **Calculator:** Select this option to open a calculator on your screen.
- **Dual Monitors:** Select this option to display Acrobat across two monitors while maximizing the PDF display on each screen.
- **Expand All Bookmarks:** Select this option to expand the active file's bookmarks in one click.



The Adobe Acrobat toolbar includes several FileRoom-specific icons that allow you to add documents to FileRoom or edit existing FileRoom documents.

NOTE: We recommend using ScanFlow for uploading large quantities of paper documents. Many of the options described in this section are used in conjunction with ScanFlow. Please refer to the *ScanFlow User Guide* for a detailed description of ScanFlow and its functions.

LEARNING ABOUT FILEROOM-SPECIFIC ACROBAT TOOLS

- **Scan with Adobe Acrobat:** Click the  icon to scan a single-page document and add it to FileRoom.
- **Add to FileRoom:** Click the  icon to add a PDF file to FileRoom, including creating index entries for the file.
- **Save Back to FileRoom:** Click the  icon to save changes made to a PDF file that was checked out for editing. You have the option to keep working or to close the document after saving.

LEARNING ABOUT SCANFLOW ACROBAT TOOLS

- **Create Predefined Bookmark Lists:** Click the  icon to add predefined bookmarks to a PDF stored in FileRoom.
- **Create Page Bookmarks:** Click the  icon to add page-level bookmarks to a PDF stored in FileRoom.

NOTE: This options are available only when the following criteria are met:

- The document is in “Checked Out” mode.

- The “PDF Bookmarks” flag is enabled for your database.

LEARNING ABOUT TAXSORT ACROBAT TOOLS

- **Provide Feedback for TaxSort Document:** Click the  icon to provide feedback regarding the TaxSort process.

NOTE: This option is available only when the following criteria are met:

- The “TaxSort” flag is enabled for your database.
- You open a TaxSorted document from the “Document Tracking” report and check it out using the **Edit** option from the Document Viewer.

EDITING PDF FILES USING THE ACROBAT TOOLBAR

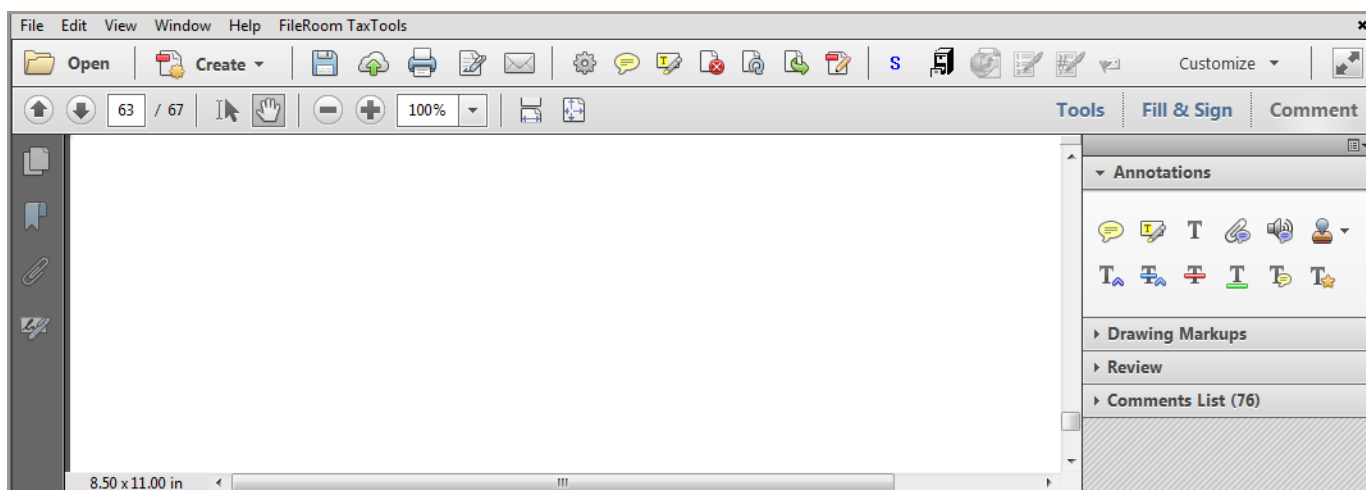
You can use icons from the Adobe Acrobat toolbars for editing PDF files already saved in FileRoom. Editing options include:

- Zoom in and out
- Rotate pages
- Adjust your view to fit the window
- Print
- Save



NOTE: Toolbar appearance may vary depending on your version of Adobe Acrobat.








USING THE ACROBAT ANNOTATIONS TOOLS

The **Annotations** section located within the **Comment** menu provides electronic editing tools, including stamping, highlighting, notes, and check marks. To access the **Annotations** section, click **Comment** from the Acrobat toolbar, then click **Annotations**.



Refer to the following table for more information about the **Annotations** menu icons.

TOOLBAR ICON	DEFINITION
	<p>Click the Sticky Note icon to create a note about the content. The user's name, time, and date appear automatically on notes added to documents. Double-click the icon to add text to the note.</p> <p>To move the note within the document, click and drag the icon to another location.</p>
	<p>Click the Highlight text icon, then double-click the text that you wish to highlight. Right-click the icon to choose colors and opacity.</p> <p>NOTE: Graphics cannot be highlighted.</p>

TOOLBAR ICON	DEFINITION
	Click the Add Text Comment icon to insert text into the document. The Add Text Comment dialog box appears and allows you to select a font and point size for your comment.
	Click the Stamps icon to add a stamp to your document. You can add dynamic, standard, and custom stamps to call attention to various items. Click the arrow to open a menu with extra stamp types.
	Click the Insert text at cursor icon to insert text at the cursor mark, then double-click the text in the document where you wish to insert new text. A dialog box appears and allows you to type the text that you wish to insert.
	Click the Strikethrough icon, then double-click the text that you wish to cross out. Then, double-click the crossed-out text to open a dialog box where you can enter information about the selected text.
	Click the Underline icon, then double-click the text that you wish to underline. Then, double-click the underlined text to open a dialog box where you can enter information about the selected text.
	Click the Add note to text icon, then double-click the text for which you wish to create a note. NOTE: This icon is different from the Sticky Note icon. The Add note to text icon is appropriate to use for a specific word or sentence, and the Sticky Note icon is appropriate for a larger part of a document, such as a paragraph or section.
	Click the Text Correction Markup icon to open the How to use Text Edit tools dialog box. This dialog box contains information on inserting, deleting, and replacing text.

SAVING AND DELETING ANNOTATIONS

To save any annotations made to a PDF file, click the **Save** icon before closing or select **Save** from the File menu.

To delete annotations, right-click the edited items, then select **Delete**.

VIEWING THE COMMENTS LIST SECTION

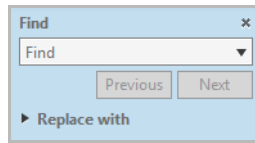
The **Comments List** section allows you to view a list of comments made about the selected PDF file. To access the **Comments List** section, click **Comment** from the Acrobat toolbar, then click **Comments List**.

SEARCHING FOR TEXT IN A PDF FILE

Because scanned documents are processed through an optical character recognition (OCR) process, text is embedded in PDF documents and can be searched.

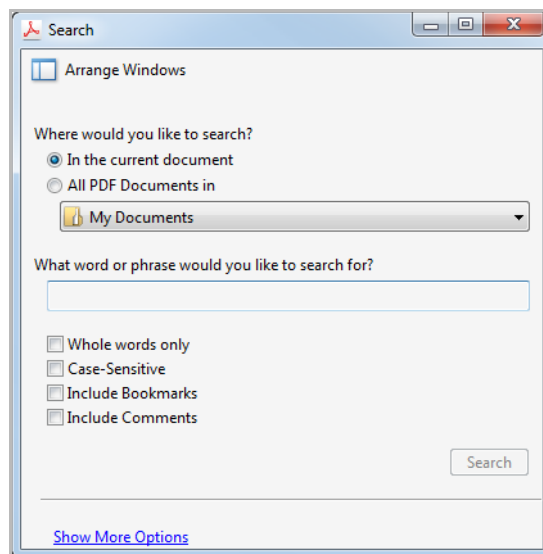
To search for a keyword in a PDF file, complete the following steps.

- 1 On the Acrobat toolbar, click the  icon. The **Find** dialog box appears.



- 2 In the **Find** field, type a keyword to use in your search. Acrobat selects the first instance of the keyword appearing in the PDF file.
- 3 Click Next to move to the next instance of the keyword in the PDF file.
- 4 Click the arrow next to the **Find** field to open a sub-menu with more search options.

TIP: Select **Open Full Acrobat Search** to open the **Search** dialog box where you can enter additional search parameters.



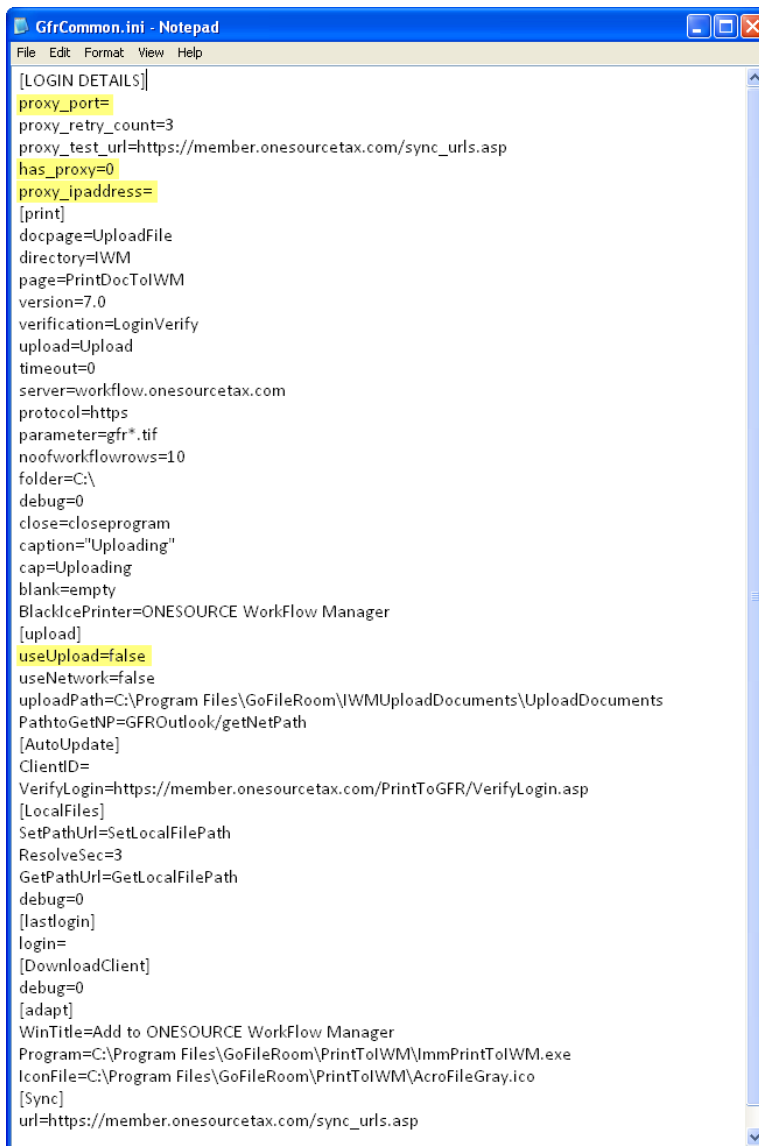
TROUBLESHOOTING

WORKING WITH A PROXY SERVER

If your company requires that you go through a proxy server to use the Internet, you will need to update the **GFRCommon.ini** file.

To do so, navigate to **C:\Documents and Settings\All Users\Application Data\GoFileRoom\Common Files**, double-click **GFRcommon.ini**, and configure the following:

- **proxy_port=** Enter the Proxy Port number
- **has_proxy=** Set the value to 1
- **proxy_ipaddress=** Enter the IP address



```

GfrCommon.ini - Notepad
File Edit Format View Help
[LOGIN DETAILS]
proxy_port=
proxy_retry_count=3
proxy_test_url=https://member.onesourcetax.com/sync_urls.asp
has_proxy=0
proxy_ipaddress=
[print]
docpage=UploadFile
directory=WWM
page=PrintDocToWWM
version=7.0
verification=LoginVerify
upload=Upload
timeout=0
server=workflow.onesourcetax.com
protocol=https
parameter=gfr*.tif
noofworkflows=10
folder=C:\
debug=0
close=closeprogram
caption="Uploading"
cap=Uploading
blank=empty
BlackIcePrinter=ONESOURCE WorkFlow Manager
[upload]
useUpload=false
useNetwork=false
uploadPath=C:\Program Files\GoFileRoom\WWMUploadDocuments\UploadDocuments
PathtoGetNP=GFROutlook/getNetPath
[AutoUpdate]
ClientID=
VerifyLogin=https://member.onesourcetax.com/PrintToGFR/VerifyLogin.asp
[LocalFiles]
SetPathUrl=SetLocalFilePath
ResolveSec=3
GetPathUrl=GetLocalFilePath
debug=0
[!astlogin]
login=
[DownloadClient]
debug=0
[adapt]
WinTitle=Add to ONESOURCE WorkFlow Manager
Program=C:\Program Files\GoFileRoom\PrintToWWM\ImmPrintToWWM.exe
IconFile=C:\Program Files\GoFileRoom\PrintToWWM\AcroFileGray.ico
[Sync]
url=https://member.onesourcetax.com/sync_urls.asp
  
```


To use the **Print to FileRoom** feature with the Upload Documents Service, set the **useUpload** value to **True**.

CONFIGURING TOOLBARS TO APPEAR IN ADOBE ACROBAT

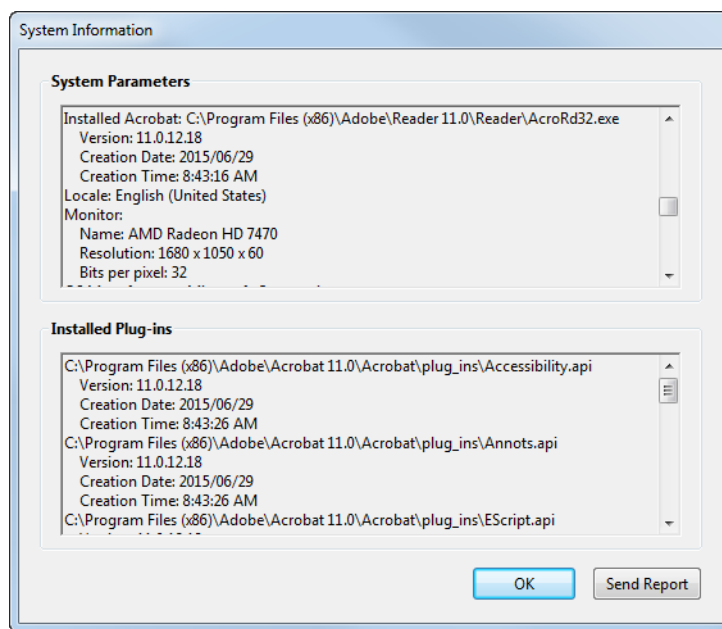
If the Adobe Acrobat Add-In is installed, but the toolbars do not appear within Adobe Acrobat, review the Acrobat plug-ins (.api files) in the following directory:

- **For Windows Vista/Windows 7 32-bit:** C:\Program Files\Adobe\Acrobat x.0\Acrobat\plug_ins\
- **For Windows 7 64-bit:** C:\Program Files(x86)\Adobe\Acrobat x.0\Acrobat\plug_ins\

NOTE: The x in the directories listed above denotes your Acrobat version number.

To move all the files found in this directory into your Acrobat plug-ins directory, complete the following steps.

- 1 Locate your Acrobat plug-ins directory. To do so, open Acrobat, then complete the listed steps.
 - > From the **Help** menu, select **Online Support**, then select **Generate System Report**. The **System Information** dialog box appears, and displays information about your computer, including the location of your plug-ins folder.



- > Make a note of the plug-ins folder found under the **Installed Plug-ins** section.

NOTE: In the example above, the plug-ins folder is
C:\ProgramFiles (x86)\Adobe\Acrobat 11.0\Acrobat\plug_ins\.

- 2 Click **OK** to close the **System Information** dialog box.
- 3 Close Acrobat.

- 4 Open Windows Explorer and navigate to your Acrobat plug-ins directory.
- 5 Copy all .api files and the **Annotations** folder.
- 6 Paste all of the .api file and **Annotations** folder into your Acrobat plug-ins directory.
NOTE: If prompted, click **Yes** to overwrite all.