

# WORKFLOW TOOLS

## FileRoom User Guide

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## LEARNING ABOUT FILEROOM

The FileRoom application is part of the WorkFlow Tools suite of products, and allows you to upload and organize different sets of documents into file cabinets for easy management. FileRoom includes an administrative area for setting up drawers, managing groups and group/user security features, and more for users who have Administrator permissions.

### UNDERSTANDING THE FILEROOM TERMINOLOGY

The following key terms are common to FileRoom:

- **File cabinet** – A virtual repository for your documents. Each file cabinet includes up to five customizable drawers where you can file and manage your documents. You can have multiple file cabinets. Each file cabinet and drawer is configured during the implementation process. Your administrator can make any changes to the file cabinets or drawer as needed.
- **FileRoom page** – Your file cabinet and drawers appear on this page, as well as navigation links to other functions and administrative areas.
- **Document** – Information or communication required to complete a task or workflow. Any type of record, or exchange of information (electronic or hard copy) can be added to FileRoom as a document. Many of the WorkFlow Manager features, assignment and tracking capabilities, and security features associated with tasks and workflows also apply to documents.
- **Notes** – A notation that an open item within a workflow requires attention.
- **WorkFlow Manager** – The WorkFlow Manager application is closely related to FileRoom, and provides visibility into each project's status, enabling you to make more strategic decisions and reduce risk.
- **Workflow** – An organized process to help you keep track of the tasks, documents, roles, checklists, notes, research, and other components related to your overall goal.

### UNDERSTANDING THE FILE CABINET AND DRAWERS BASICS

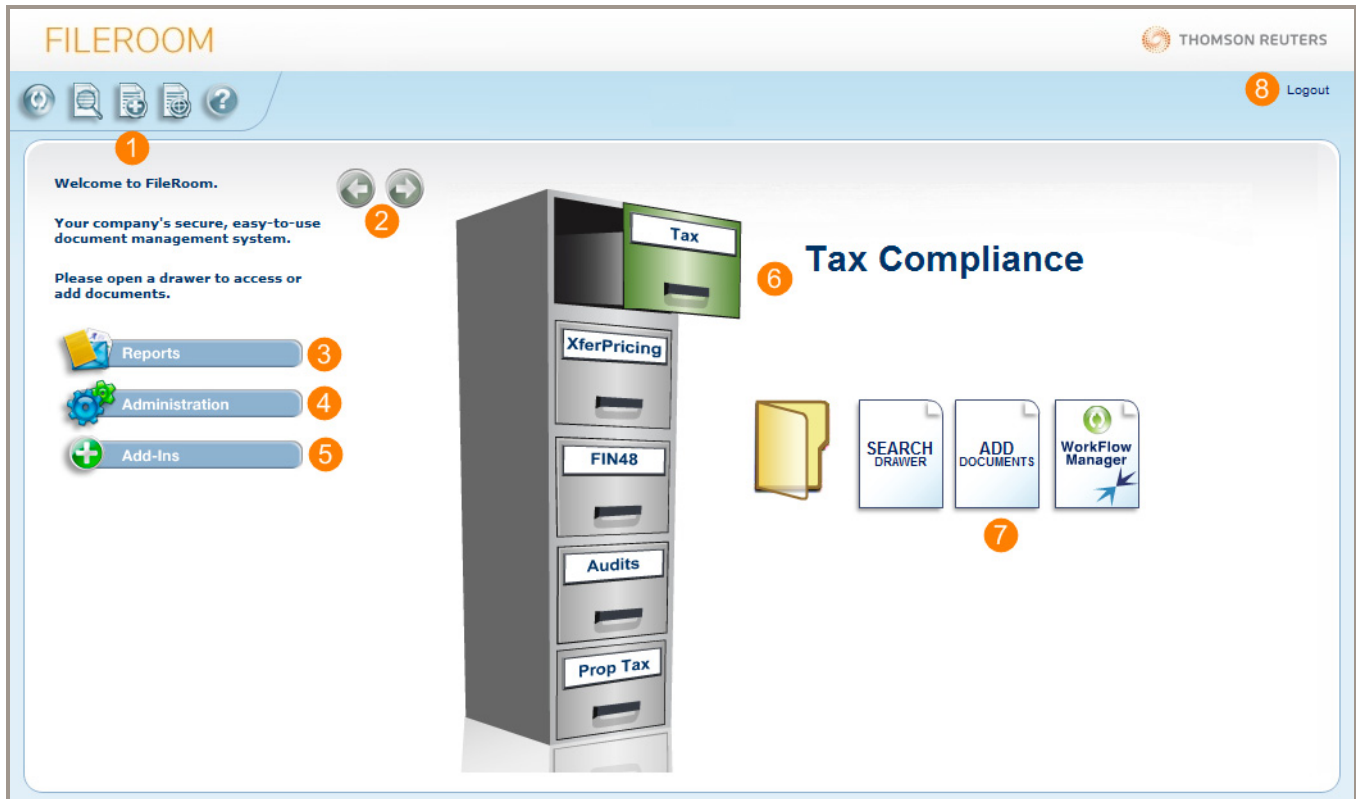
File cabinets are virtual repositories for your documents. Each cabinet has five customizable drawers that represent common ideas or business functions, such as Tax Compliance or Audits. You can have as many file cabinets as you need.

File cabinets and their drawers are configured during implementation. Your administrator can make any changes as needed.







### LEARNING ABOUT THE MAIN FILEROOM PAGE

The main FileRoom page is the entry point for document management, and is set up much like an office filing cabinet with multiple drawers. You file your documents in these drawers, then can add new documents, modify existing ones, or even delete obsolete documents.

**NOTE:** Depending on your permissions, you may see some functions on your FileRoom page but will not have direct access. Contact your administrator for more information.



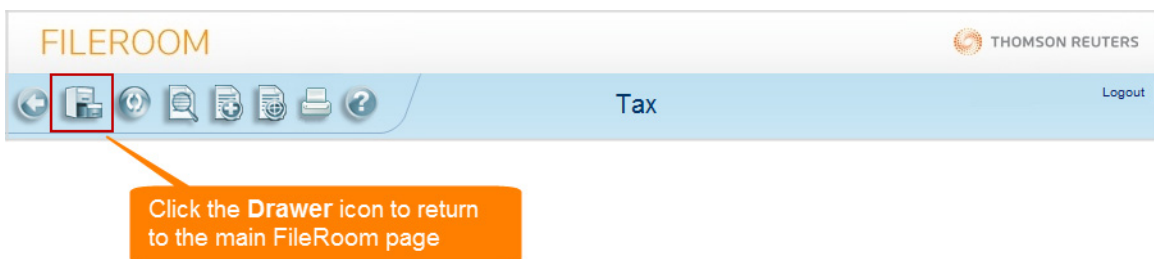
The FileRoom page contains the following components:

<b>1</b>	<p><b>Feature icons:</b> Click one of the following icons.</p> <ul style="list-style-type: none"> <li>Click  to return to the last page in FileRoom. If the icon is not visible, this means that you are on the first page.</li> <li>Click  to open WorkFlow Manager.</li> <li>Click  to search for documents within the selected drawer.</li> <li>Click  to add documents to the selected drawer.</li> <li>Click  to run a “Document Tracking” report. This report provides a list of the documents added to the system. You can search by status or indexes to find the documents that you need.</li> <li>Click  to open this user guide as a PDF file.</li> </ul>
<b>2</b>	<p><b>Navigation arrows:</b> Click the left or right arrow to move from one cabinet to another.</p>
<b>3</b>	<p><b>Reports button:</b> Click <b>Reports</b> to open the <b>Reports</b> page where you can generate reports related to your stored documents.</p>
<b>4</b>	<p><b>Administration button:</b> Click <b>Administration</b> to open the <b>Administration</b> page.</p> <p><b>NOTE:</b> The <b>Administration</b> button is visible only if you have administrative rights.</p>

- 5
**Add-Ins button:** Click **Add-Ins** to open the **Add-Ins** page.  
**NOTE:** Refer to the *FileRoom Add-In Installation Guide* for information on how to download and install Add-Ins.
- 6
**Selected drawer:** The selected drawer appears in green and is “open” after you hover over it. The drawer name appears in bold adjacent to the selected drawer on the main FileRoom page, and in blue on subsequent FileRoom pages.
- 7
**Drawer option icons:** Click one of the icons to perform this option for the selected drawer.
- 8
**Logout link:** Click the **Logout** link to close the FileRoom application.

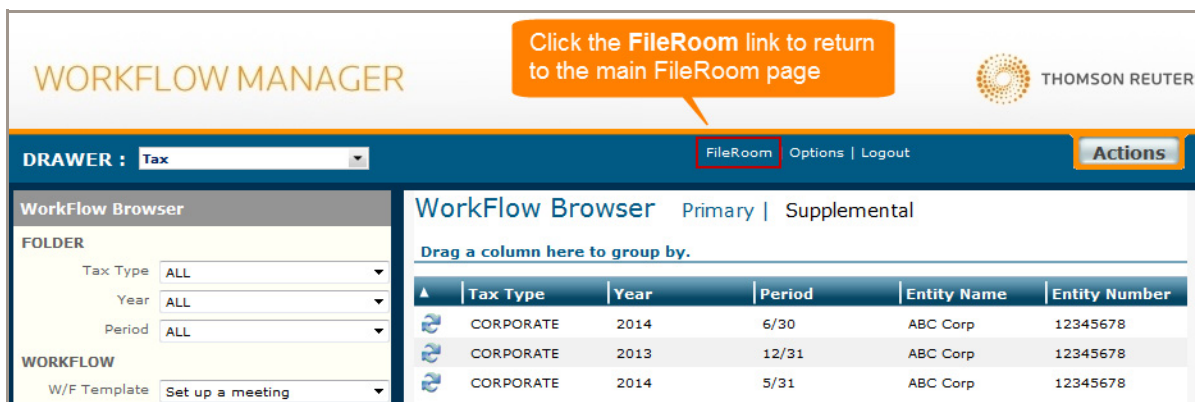
## RETURNING TO THE MAIN FILEROOM PAGE FROM ANOTHER FILEROOM PAGE

Pages other than the main FileRoom page include the **Drawer** icon to assist you with navigation. Click this icon to return to the main FileRoom page. For example, if you are working in the **Administration** module, click the **Drawer** icon to return to the main FileRoom page.



## RETURNING TO THE MAIN FILEROOM PAGE FROM WORKFLOW MANAGER

If you are working in WorkFlow Manager and need to log into FileRoom, click the FileRoom link at the top of any WorkFlow Manager page.



## INDEXING DOCUMENTS

Documents stored in FileRoom do not have file names. Instead, they have a set of *index values* which create a document profile. These index values provide an easy, yet powerful, method of searching for your FileRoom documents.

**Each field in this section represents an index value that FileRoom uses for each document to create a document profile**

**FILEROOM** THOMSON REUTERS

Tax Logout

**Add Documents**

- Tax Type
- Year
- Period
- Entity Name
- Entity Number
- Jurisdiction
- File Section
- Document Type
- Description
- Document Date: 9/14/2015

Clear Recall Values

**Please choose a filing method**

Barcode Print  Multi Mode  Print All Counter: 0

Browse


Add File Link

**Print bookmark separators.**

Bookmarks

## UNDERSTANDING INDEX VALUES

Your index values will be set up during the implementation process. Index values can be in the following formats:

- Drop-down lists
- **Parent/child relationships:** Subsequent values are based on previous index selections. In the example above, selections in the **File Section** list depend on what you select from the **Tax Type** list).
- **Lookup lists:** Click the magnifying glass icon  to open a separate list for lists too long to be shown in a traditional drop-down list.
- **Date fields:** Click the calendar icon adjacent to the **Document Date** field to choose a date or date range.

Drawers and the indexes associated with those drawers are managed by your administrator. Drop-down menus and lookup lists are managed lists, and can be customized by your administrator.

## INDEXING A DOCUMENT

Regardless of the method that you use to add documents, we recommend that you enter index values to identify your documents. With proper indexing, searching for a specific document is quick and efficient.

### TIPS:


- If you are unsure of the exact search criteria, you can use a wild card search within each lookup list. To do so, type an asterisk (\*) before or after your partial entry, then click the magnifying glass icon to search for values that meet your criteria. Double-click a value to populate the index field.
- The **Description** field is not required, but we recommend that you add a description to aid in distinguishing between documents with similar index values. Descriptions do not appear in search results.

To index a document, complete the following steps.

- 1 Select a drawer to which your document will be added.
- 2 Click the **Add Documents** icon. The **Add Documents** page appears.

The screenshot shows a web form titled "Add Documents". It features a list of fields, each with a checkbox and a corresponding input area. The fields are: Tax Type (dropdown), Year (dropdown), Period (dropdown), Entity Name (text with magnifying glass), Entity Number (text with magnifying glass), Jurisdiction (text with magnifying glass), File Section (dropdown), Document Type (dropdown), Description (text), and Document Date (text with calendar icon). The fields for Tax Type, Year, Period, Entity Name, Entity Number, Jurisdiction, File Section, and Document Date are highlighted in light blue. At the bottom of the form, there are two buttons: "Clear" and "Recall Values".

**NOTE:** The index fields that appear are based on the drawer that you selected in step 1. All fields shaded in blue are required.

- 3 Enter the relevant information in each list or field as applicable.
  - Drop-down menus allow you to select values from a pre-populated list.
  - Open a lookup list by clicking the magnifying glass icon . Then, browse through the pages and double-click your selection to populate the index field.

The current date appears by default. To change the date, click the calendar icon and select a new date or type a date in your supported date format.

**NOTE:** Refer to the “Adding Paper Documents” and “Adding Electronic Documents” sections of



this guide to learn more about uploading documents into the system.

## USING CHECK BOXES AND RECALL VALUES

After you add a document, the check boxes next to each index field instructs FileRoom to retain the last value entered in the applicable field. Empty check boxes will point to blank fields. Unless you click **Clear**, values will be retained until you log out of FileRoom. This can be helpful when you are adding several documents with similar values.

- Clicking **Clear** resets all index values to blank, including those in which the check box is selected.
- Clicking **Recall Values** populates the index fields with values from the last document added.
- All values are reset when you log in to FileRoom.

## ADDING DOCUMENTS

FileRoom allows you to add documents in several different ways including the following:

- **Paper documents:** You can scan and upload paper documents, then index them as single documents or through batch scanning.
- **Electronic documents:** You can upload electronic documents to FileRoom's repository or index them, then add them as a File Link.
- **Different ways of adding documents:** You can add documents through the file cabinet, from your desktop, or from within their native applications (Microsoft Excel, Microsoft Word, Adobe Acrobat, or Microsoft Outlook)

Refer to the Appendix for a list of best practices for adding documents to FileRoom.

### ADDING PAPER DOCUMENTS

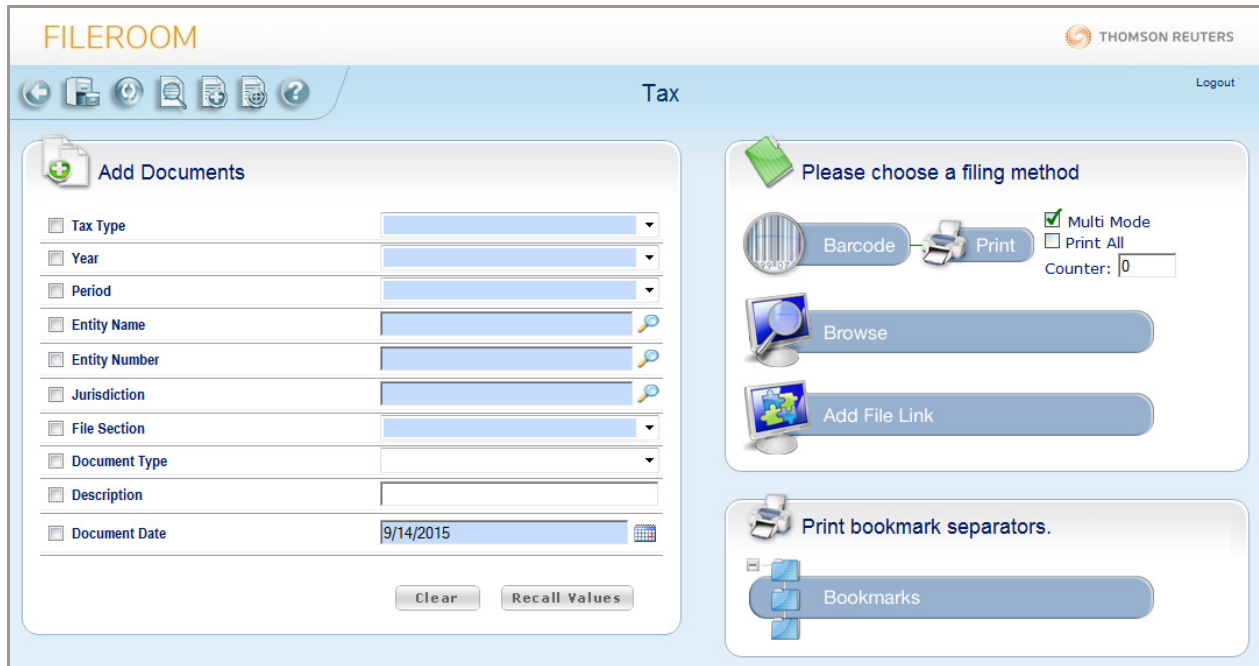
You can scan and upload any hard document received from your clients or a government agency for online viewing. During the upload process, the paperwork goes through an optical character recognition (OCR) process which allows these documents to be searched using a text search. Refer to the "Document Search" section in this guide for more information about searching documents.

Scanned documents can be saved as a new PDF or appended to an existing PDF. We recommend that you create bookmarks to divide PDF files into sections for easy navigation and online viewing.

### FILING DOCUMENTS BY PRINTING A SINGLE BARCODE

To print a single barcode, complete the following steps.

- 1 Select a drawer in which to add the document, then click the **Add Documents** icon. The **Add Documents** page appears.



- 2 Complete the fields in the **Add Documents** section.
- 3 In the **Filing Method** section, clear the **Multi Mode** check box. When this check box is cleared, the **Barcode** button appears larger, and the **Print** button, **Print All** check box, and **Counter** fields are hidden as shown below.

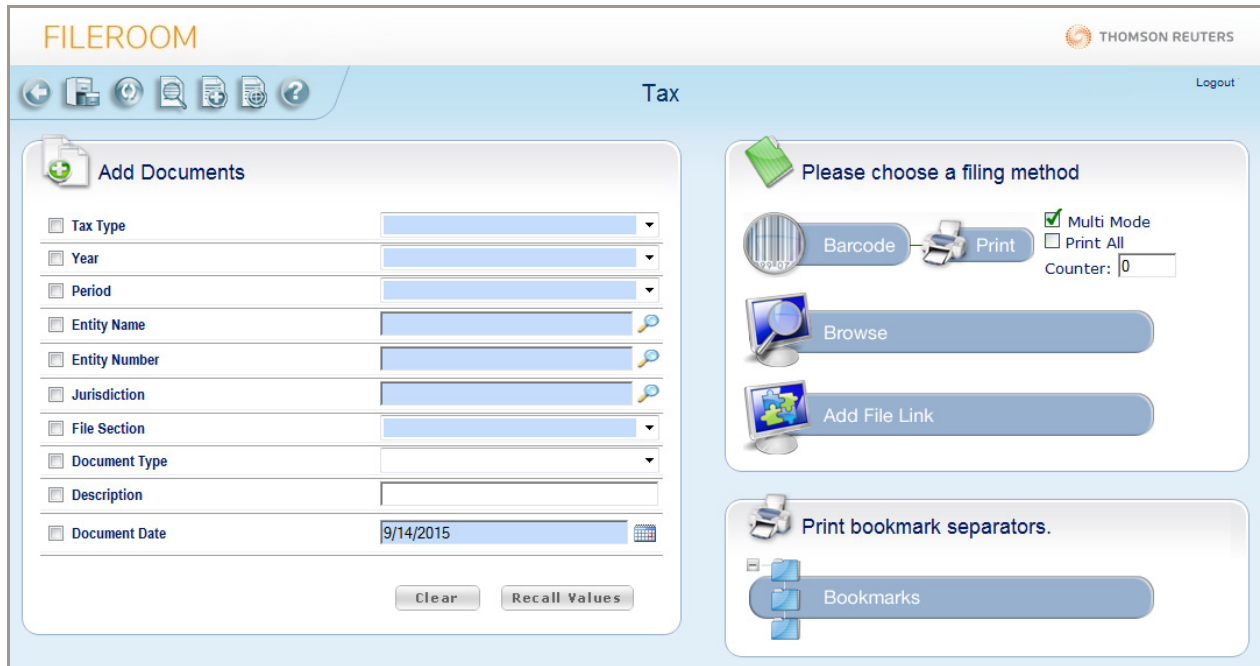


- 4 Click **Barcode**. A barcode page opens as well as the **Print** dialog box.
- 5 Print the barcode cover page.

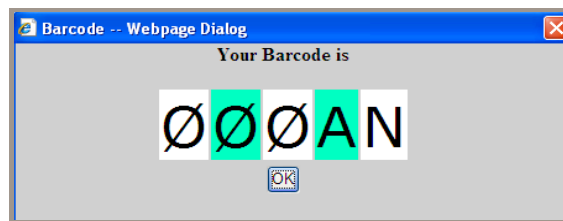
## FILING DOCUMENTS BY PRINTING MULTIPLE BARCODES

To print multiple barcodes, complete the following steps.

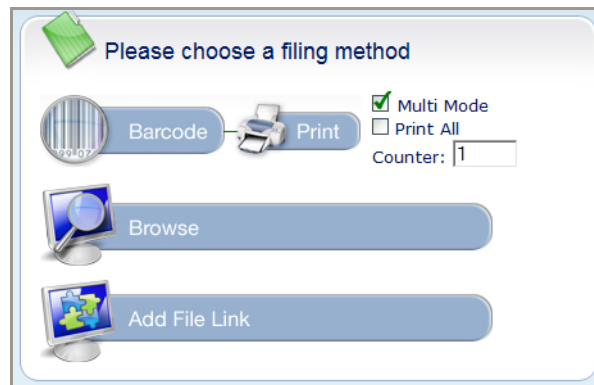
- 1 Select a drawer in which to add the document, then click the **Add Documents** icon. The **Add Documents** page appears.



- 2 Complete the fields in the **Add Documents** section.
- 3 In the **Filing Method** section, select the **Multi Mode** check box, then click the **Barcode** button to generate a unique barcode ID.



The number in the **Counter** field increases by one, and corresponds to the number of barcodes that you are generating.



- 4 Repeat steps 1 through 3 for documents with different indexes.

**TIP:** Since FileRoom allows you to add documents with identical indexes, we recommend that you use the **Description** field to set your index values apart.

**NOTE:** Selecting the **Print All** check box will print all barcode sheets queued up by people in your firm--not just your own barcode sheets.

## PRINTING BOOKMARK SEPARATORS

FileRoom uses *bookmarks* to divide documents into logical sections for easier online viewing. Bookmarks are managed lists configured within the FileRoom “Administrative” section. To add or make changes to these lists, contact your administrator.

**TIP:** You can create bookmark separator sheets in any drawer, not just the drawer in which they were created. Since they are not assigned identification numbers like barcodes are, bookmarks can be used more than one time.

To print a bookmark, complete the following steps.

- 1 Select a drawer in which to add the document, then click the **Add Documents** icon. The **Add Documents** page appears.
- 2 In the **Print bookmark separators** section, click **Bookmarks**.



Bookmark separator sheets open as well as the **Print** dialog box.

- 3 Print the bookmark separator sheets.

## PREPARING DOCUMENTS FOR SCANNING

After printing barcodes and bookmarks, prepare your documents for scanning. To do so, complete the following steps.

- 1 On the barcode cover page, complete the information at the bottom of the page, including the following:
  - > Number of pages
  - > Scanned By
  - > Duplex pages (print pages double-sided)
  - > Return To
  - > Shred
- 2 Place the barcode cover page on top of the document to be scanned.
- 3 Insert the bookmark separator sheets in the appropriate locations.
- 4 Clip the document (do not staple), and send it to the scan station.

Refer to the *ScanFlow User Guide* for more information about preparing and scanning documents for FileRoom.

## ADDING ELECTRONIC DOCUMENTS

You can add electronic documents to FileRoom using one of the following methods:

- From the file cabinet
- From Microsoft Word, Microsoft Excel, or Adobe Acrobat
- From the Control Panel Add-In.

### NOTES:

- The toolbars for Adobe Acrobat are included in the installation of the FileRoom Add-In.
- For documents larger than 120MB, we recommend using the Control Panel Add-In.

## USING THE BROWSE BUTTON TO ADD DOCUMENTS

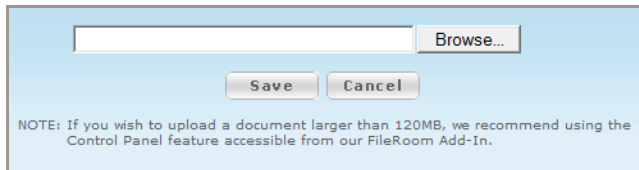
To add documents by clicking the **Browse** button, complete the following steps.

- 1 Select a drawer in which to add the document, then click the **Add Documents** icon. The **Add Documents** page appears.
- 2 Complete the fields in the **Add Documents** section.

The screenshot shows the FileRoom interface for adding documents. The top navigation bar includes the FileRoom logo, Thomson Reuters logo, and a Logout button. The main content area is titled 'Tax' and contains several sections:

- Add Documents Form:** A form with the following fields:
  - Tax Type: FEDERAL INCOME
  - Year: 2015
  - Period: 12/31
  - Entity Name: ACME TRUCKING, INC.
  - Entity Number: 603
  - Jurisdiction: FEDERAL
  - File Section: DEPRECIATION
  - Document Type: (empty)
  - Description: (empty)
  - Document Date: 9/21/2015
- Filing Method Selection:** A section titled 'Please choose a filing method' with options:
  - Barcode
  - Print
  - Multi Mode (checked)
  - Print All
  - Counter: 0
- Navigation Buttons:** 'Browse' and 'Add File Link' buttons.
- Print Options:** A section titled 'Print bookmark separators.' with a 'Bookmarks' button.

- In the **Please choose a filing method** section, click **Browse**. The **Upload a Document** dialog box appears.



- Click **Browse** to look for the file that you want to add. Click **Save** to upload the file to FileRoom or click **Cancel** to return to the **Add Documents** page.

When uploading is complete, the **Add Documents** page remains open. To index and upload more documents, repeat steps 2 through 4.

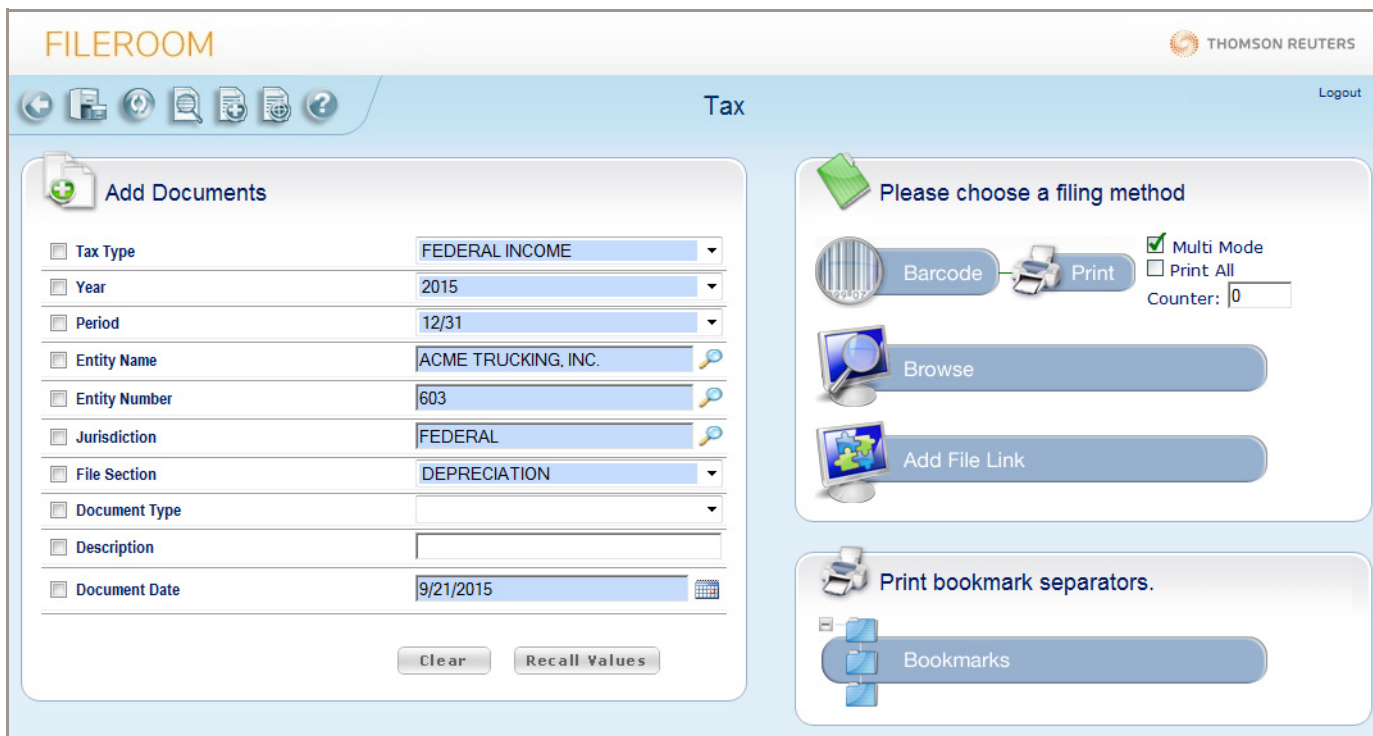
- Click the back arrow or file cabinet icon to return to the FileRoom page.

### ADDING A DOCUMENT LINK

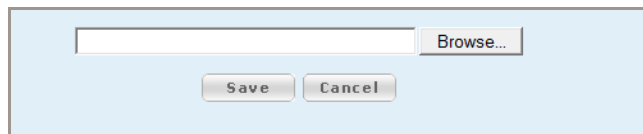
Instead of adding a document to FileRoom, you can add a document link. Linking does not copy the document, but directs users to the document saved at a different location on the network.

**NOTE:** If you want your document to be available in a particular workflow, best practice is to use a method that allows you to link to a specific workflow.

- Select a drawer in which to add the document, then click the **Add Documents** icon. The **Add Documents** page appears.
- Complete the fields in the **Add Documents** section.



- 3 In the **Please choose a filing method** section, click **Add File Link**. The **Add a Local Linked File** dialog box appears.



- 4 Click **Browse** to look for the file that you want to add. Click **Save** to upload the file to FileRoom or click **Cancel** to return to the **Add Documents** page.

When uploading is complete, the **Add Documents** page remains open. To index and upload more documents, repeat steps 2 through 4.

- 5 Click the back arrow or file cabinet icon to return to the FileRoom page.



## SEARCHING FOR DOCUMENTS

FileRoom allows you to search for and retrieve your documents with ease and efficiency. When searching for a document, you can

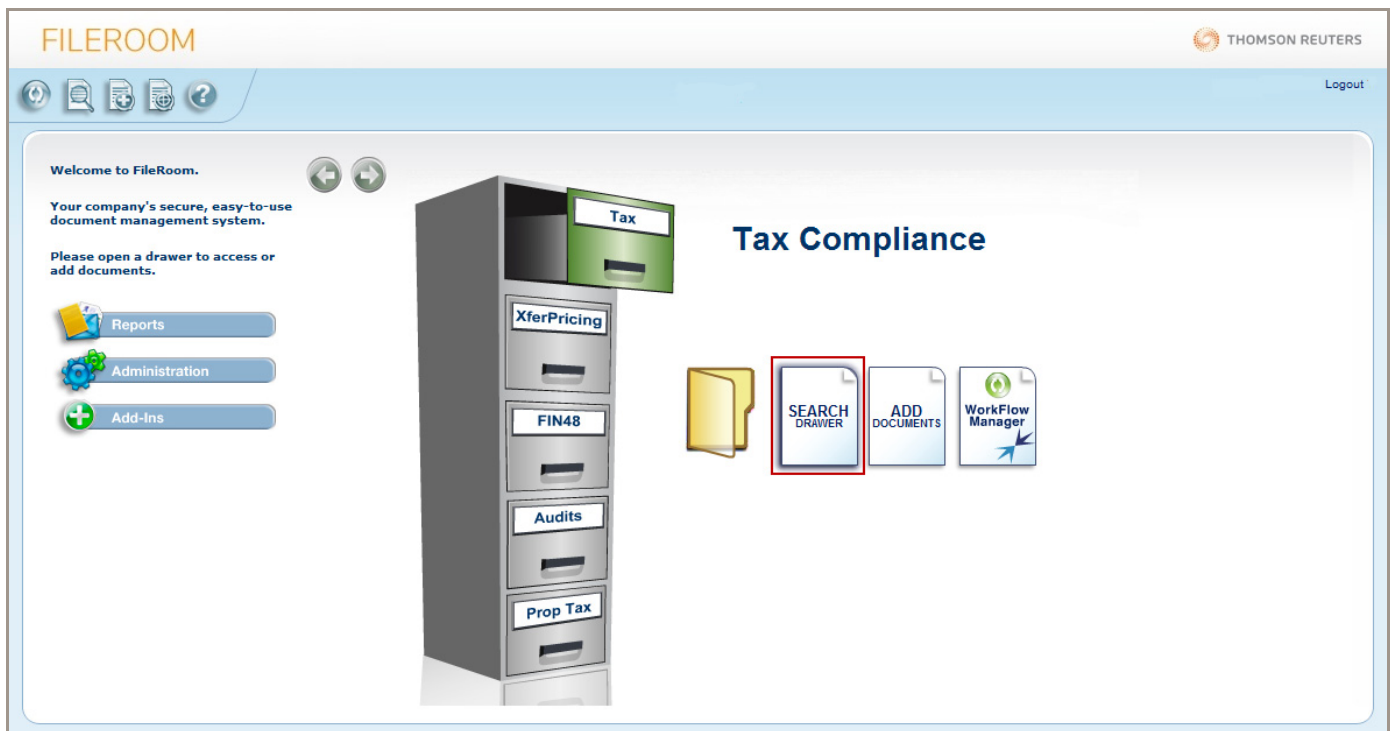
- Use the index values created when adding a document
- Allow wildcard searches in lookup lists
- Search text for key words or phrases
- Use more than one search value
- Allow you to export search results

Remember, the more criteria that you use in your search, the more refined your search results will be. Search results appear in a grid that includes index, file, and status information.

### OPENING THE SEARCH FOR DOCUMENTS PAGE

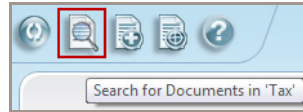
To open the **Search for Documents** page, from the main FileRoom page, select a drawer to search, then complete one of the following actions:

- Click the **Search Drawer** icon.



– Or –

- Click the **Search Documents** icon. FileRoom opens the last drawer that you accessed by default. The tooltip indicates the drawer that you are searching.



The **Search for Documents** page appears.

## PERFORMING A SEARCH

To perform a search in FileRoom, complete the following steps.

- 1 Open the **Search for Documents** page.
- 2 Type your search criteria in the index fields, then click **Search**. The results of your search appear in the “Results” “Search Results” grid on the right side of the page. The search criteria that you used appear in a heading row above the “Results” grid.

The screenshot shows the FileRoom Tax interface. On the left, there is a 'SEARCH FOR DOCUMENTS' section with various filters: Tax Type (FEDERAL INCOME), Year (2012), Period (12/31), Entity Name, Entity Number, Jurisdiction, File Section, Document Type, Description, and Document Date. Below this is a 'TEXT SEARCH' section with a search option set to 'All', search, clear, and save buttons, and a 'Copy To Laptop' button. On the right, a table displays search results for 'Tax Type - FEDERAL INCOME, Year - 2012, Period - 12/31'. The table has columns for Type, Entity Name, Entity Number, and Jurisdiction. One result is shown: FM ASSOCIATES, INC with Entity Number 3331 and Jurisdiction FEDERAL.

**TIPS:**


- To refine your search results, type additional criteria in the index fields, then click **Search**.
- To start a new search, click **Clear**, then re-enter criteria in the index fields.

## USING DIFFERENT SEARCH TECHNIQUES

FileRoom can search for documents using index fields in various ways. Understanding the types of search techniques available can help you refine your search.

### SEARCHING BY WILD CARD SEARCHES AND LOOKUP LISTS

If you are unsure of your exact search criteria, you can use a wild card search within each lookup list. To do so, type an asterisk (\*) before or after your partial entry, then click the magnifying glass icon to search for values that meet your criteria. Double-click a value to populate the index field.

For example, if you type **\*Acme** in the **Entity Name** field and click the magnifying glass icon , only entries with **Acme** in their name will appear in the **Search Lookup Results** dialog box.

Search Lookup Results

SEARCH CRITERIA	Entity Number	Entity Name
Entity Name: <input style="width: 100%;" type="text" value="*ACME"/> Entity ID: <input style="width: 100%;" type="text"/> Entity Type: <input style="width: 100%;" type="text"/> Entity Group: <input style="width: 100%;" type="text"/> Location: <input style="width: 100%;" type="text"/>	687 662 002 602 688 303 603	ACME Cayman Finance Ltd ACMED Education (India) Limited Acme Sidings ACME Holdings Europe ACME Interamericana, S. A. ACME New York, Inc. ACME Trucking, Inc.

Page 1 of 1 (7 items)


## SEARCHING BY MULTIPLE INDEXES

You can use any combination of index fields when searching. The more criteria that you specify, the more targeted your search results will be.

## SEARCHING BY MULTIPLE VALUES

You can select one or more values for each field. This includes all field types and search methods, including lookup lists, drop-down lists, document descriptions, and date ranges.

To select multiple values, complete the following steps.

- 1 Open the **Search for Documents** page.
- 2 Click the **Multi-value Search** icon  to the right of an index field. The **Listed Values** dialog box appears. In the following example, we clicked the **Multi-value Search** icon next to the **Year** list.


- 3 Select the values that you want to include in the search. You can select more than one value.
- 4 Click **OK**. The values appear in the index field.

**NOTE:** In certain lookup lists, you can select the check box next to the index field name to include all values.

## SEARCHING BY DESCRIPTION

You can use all or part of a description to search for documents. To increase the amount of results, we recommend that you add an asterisk before, after or before/after a description. For example, typing **\*W-2\*** would return all documents with the text “W-2” anywhere in the description.

To enter multiple values for the description, complete the following steps.

- 1 Open the **Search for Documents** page.
- 2 Click the **Multi-value Search** icon  to the right of the **Description** field. The **Search Values** dialog box appears.

- 3 Type the description you would like to include, including any asterisks, in the blank field.
- 4 Click **Add**. If you need to remove a description from the list, click **Remove**.
- 5 Click **OK**.

## SEARCHING BY DATE RANGE

You can search by a specific date or a date range. If left empty, the fields default to the current date for the **To** date and 1/1/1950 for the **From** date.

## SEARCHING BY TEXT

You can perform a text search using key words or phrases within a document, including scanned documents and PDF files. These documents are fully searchable by text when they are run through the optical character recognition (OCR) process.

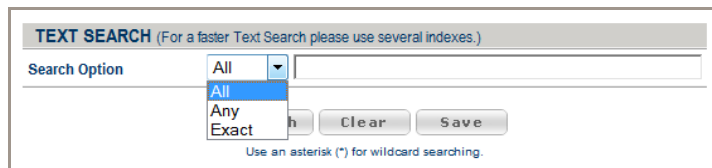
### NOTES:

- Wild card searches are allowed, but the search will be quicker if you enter an actual index value instead.
- Your administrator must consult Implementation or Support for Text Searching capabilities to be enabled for your firm.

FileRoom supports using multiple values in text searching. If you enter more than one word, make sure that you specify what type of search should be performed: **All**, **Any** or **Exact**.

To do so, complete the following steps.

- 1 Open the **Search for Documents** page, then scroll to the **Text Search** section.



- 2 In the **Search Option** list, select one of the following options:
  - > **All:** The document should contain all words in your search criteria in any sequence
  - > **Any:** The document can contain one or more of the words included in your search criteria.
  - > **Exact:** Your search criteria should exactly match the sequence of the words in the document.
- 3 Type a value into the blank field. You must enter at least one index value in the index fields to perform a text search.
- 4 Click **Search**.

**NOTE:** Your search results may include PDF files. If you open a PDF file included in the search results, a summary of each instance of the search text within that PDF appears. Clicking any of those links will open the page where the search text is found. The search text will be highlighted.

Options Menu vs. Toolbars

## Documents

A Document is a form of information or communication required to complete a task or workflow. Almost any type of record, paper, or exchange of information, electronic or hard copy, can be added to OWM as a document.

Documents:

- Can be configured, customized, and edited.
- Retain their original format when saved.
- Incorporate security, compliance, and user notification functions.

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### Understanding OWM and FileRoom

All Documents added to the system are can be found either through the File Cabinet drawer or in the Documents Views Area in WorkFlow Manager.

The same index values are utilized whether adding to the drawer or a specific workflow. The difference is, by adding to a workflow, documents specific to that workflow are more efficiently tracked.

---

### Accessing Documents

There are two ways to access Documents:

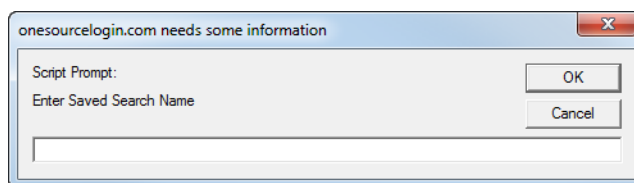
- The Documents Navigation Bar - Displays all Documents in ONESOURCE WorkFlow Manager.

## SAVING A SEARCH

You can save up to ten searches for quick retrieval. The “Last Ten Viewed Docs” is the default saved search.

To create a saved search, complete the following steps.

- 1 Enter your search criteria in the index fields, including the **Text Search** section if desired, then click **Save**. A message appears, and asks you to enter your search name.



- 2 Enter a name for the saved search.
- 3 Click **OK**. The message closes and the new search appears in the **Saved Search** list.

**IMPORTANT!** You cannot delete a saved search.

To perform a saved search, select a search from the **Saved Search** list. The search results open automatically and will appear in the "Search Results" grid.

## EXPORTING SEARCHES

You can export searches to Microsoft Excel or to a laptop as necessary.



## EXPORT TO EXCEL

You can export your search results to a Microsoft Excel workbook. To export the search results, click the Microsoft Excel icon above the "Search Results" grid, then follow the prompts to open or save the workbook.

The screenshot shows the FileRoom interface with the following elements:

- Header:** "FILEROOM" logo on the left and "THOMSON REUTERS" logo on the right. A "Logout" link is also present.
- Navigation:** A set of icons for navigation and actions.
- Search Filters (Left Panel):**
  - Tax Type:** FEDERAL INCOME
  - Year:** 2009
  - Period:** (empty)
  - Entity Name:** (empty)
  - Entity Number:** (empty)
  - Jurisdiction:** (empty)
  - File Section:** (empty)
  - Document Type:** (empty)
  - Description:** (empty)
  - Document Date:** (empty)
- Text Search (Left Panel):**
  - Search Option:** All
  - Buttons:** Search, Clear, Save
  - Instructions:** Use an asterisk (\*) for wildcard searching.
  - Saved Search:** Federal - 2009
  - Copy To Laptop:** A button with a laptop icon.
- Results Table (Right Panel):**

**Tax Type - FEDERAL INCOME, Year - 2009**

Type	Period	Entity Name	Entity Number
ABEX, INC.	7/31	5132	
FMA ENGINEERING	12/31	4340	
JOE JACKSON	12/31	0001	
JOE JACKSON	12/31	0001	
KUMAR	1/31	9999	
KUMAR	1/31	9999	
KUMAR	1/31	9999	
T.R. HADEN, INC. AND SUBSIDIARIES	12/31	2564	
TRACTOR SALES, INC	1/31	4789	
TRACTOR SALES, INC	1/31	4789	

## COPY TO LAPTOP

You can download search results to your local computer.

**NOTE:** Documents viewed offline are read-only, and online features are not available.

- 1 Perform a FileRoom search.
  - NOTE:** Toggle back to the **Search for Documents** page by clicking the back arrow to view the search results and the search criteria.
- 2 Click **Copy to Laptop**.

The screenshot shows the FileRoom interface with the following components:

- Header:** "FILEROOM" logo on the left and "THOMSON REUTERS" logo on the right. A "Logout" link is also present.
- Navigation:** A set of icons for navigation and actions at the top left.
- Section:** "Tax" is displayed in the top right area.
- Search Filters (SEARCH FOR DOCUMENTS):**
  - Tax Type: FEDERAL INCOME
  - Year: 2009
  - Period: (empty)
  - Entity Name: (empty)
  - Entity Number: (empty)
  - Jurisdiction: (empty)
  - File Section: (empty)
  - Document Type: (empty)
  - Description: (empty)
  - Document Date: (empty)
- Text Search (TEXT SEARCH):**
  - Search Option: All
  - Buttons: Search, Clear, Save
  - Instruction: "Use an asterisk (\*) for wildcard searching."
  - Saved Search: Federal - 2009
  - Button: Copy To Laptop (highlighted with a red box)
- Results Table (Tax Type - FEDERAL INCOME, Year - 2009):**

Type	Period	Entity Name	Entity Number
	7/31	ABEX, INC.	5132
	12/31	FMA ENGINEERING	4340
	12/31	JOE JACKSON	0001
	12/31	JOE JACKSON	0001
	1/31	KUMAR	9999
	1/31	KUMAR	9999
	1/31	KUMAR	9999
	12/31	T.R. HADEN, INC. AND SUBSIDIARIES	2564
	1/31	TRACTOR SALES, INC	4789
	1/31	TRACTOR SALES, INC	4789

A dialog box appears, and shows the number of documents and cumulative size of all documents to be downloaded.

- 3 Click **OK**.
- 4 Follow the on-screen prompts, and select **Run** as needed.
- 5 When the **FileRoom Offline Documents** dialog box appears, select a location where the files will be unzipped, then click **OK**. FileRoom Offline opens in Internet Explorer ready to search.

**TIP:** We recommend that you bookmark this address so you can access your offline files later.

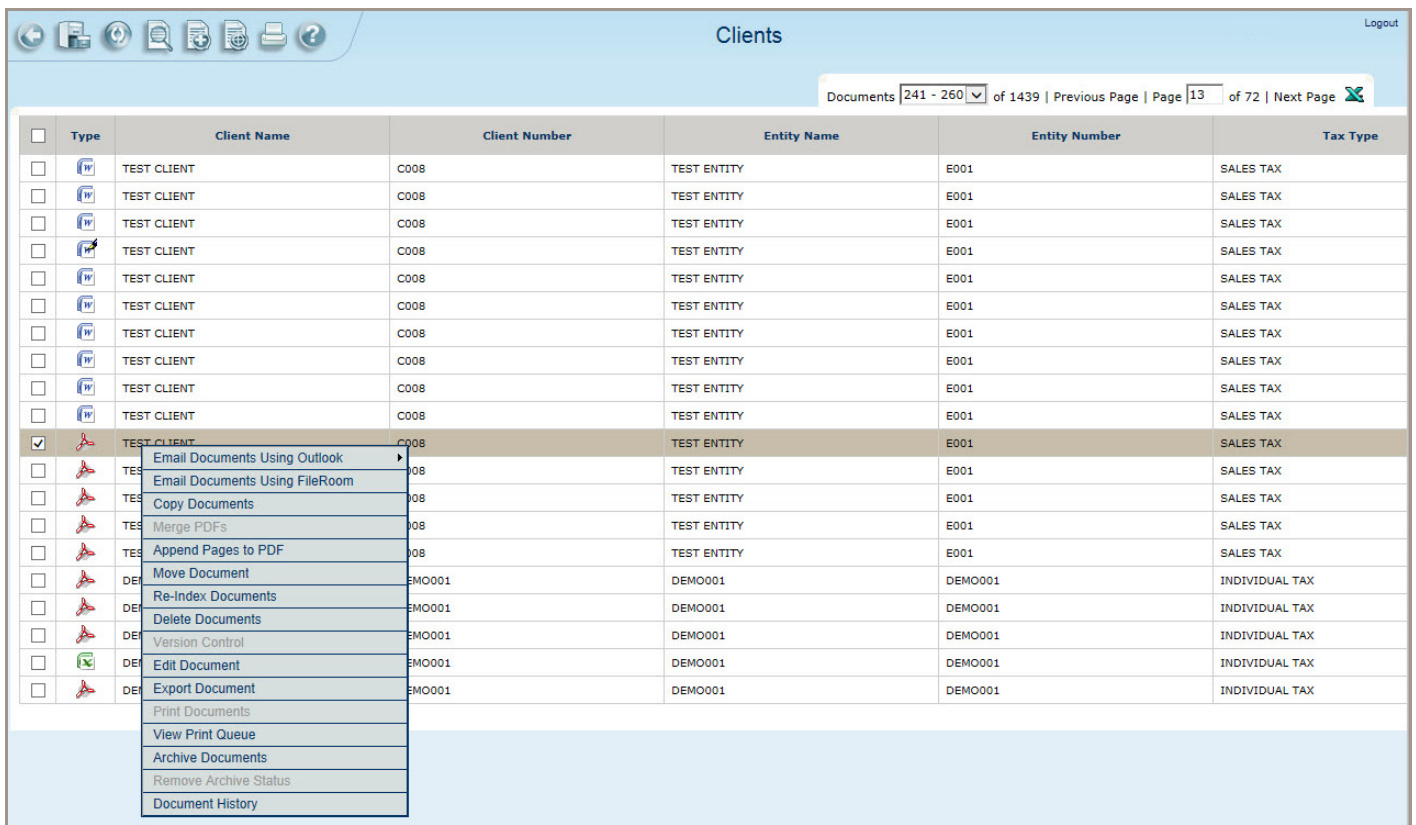
# WORKING WITH FILEROOM DOCUMENTS

Each FileRoom document appears in a grid. All documents in the Documents grid include an icon that represents the document type. The document icons will change depending on the document's status. Status types can include the following:

- Archived
- Checked Out
- Merged
- Published
- Redacted
- TaxSorted

## WORKING WITH THE DOCUMENT ACTIONS MENU

The FileRoom menu allows you to perform many types of actions.



To access the FileRoom menu, complete the following steps.

- 1 Select the check boxes next to the documents that you want to access.
- 2 Right-click to display the FileRoom menu, then select an option.

**NOTES:**

- If you select more than one document and an option appears in gray, this means that FileRoom will not allow you to perform that option on more than one document at a time.
- If you select only one document, the **Merge PDFs** and **Print Documents** will be unavailable. For these options, you must select two or more documents.

## VIEWING DOCUMENTS

You can view FileRoom documents in one of the following ways:

- **Use the FileRoom Viewer:** Click the document to open it in the FileRoom Viewer. When opened in read-only mode, the document is not considered to be checked out, and can be opened and edited by another user at the same time.
- **Edit a document:** Select the check box at the beginning of the row, right-click, then select **Edit Document**. The document is now checked out, and opened in its native application.

## EDITING DOCUMENTS

When you open a document for editing, the document appears with a “Checked Out” status. Keep the following tips in mind when you are editing a document that is checked out:

- While a document is checked out, it is available to others in a read-only format. Other users can view the document in the latest saved format, but cannot perform any actions on it.
- While you are editing or viewing a document, the animated **Checked Out** icon shows other users that the document is unavailable to them for editing.
- The **Checked Out** column in the grid shows who has the document checked out, as well as the date and time it was checked out.
- After you save your edits, the **Last Modified** column in the grid shows the name of the last editor and the date and time it was modified.

**NOTE:** FileRoom includes a “Version Control” feature that allows you to maintain different versions of the same document. This option is available for all “versioned” documents stored within FileRoom. We recommend that you select the **Version Control** option when editing documents.

## EMAILING DOCUMENTS

You can email documents from FileRoom using Microsoft Outlook or directly from FileRoom.

### EMAILING DOCUMENTS FROM FILEROOM USING MICROSOFT OUTLOOK

You can email your documents from FileRoom using Microsoft Outlook. Benefits of emailing a document from FileRoom include the following:

- You have access to your Outlook address book and contacts

- The message will appear in your Sent Items folder, allowing you to have a record of the time and date that it was sent
- The message will be sent with your Outlook signature

To email from FileRoom using Outlook, complete the following steps.

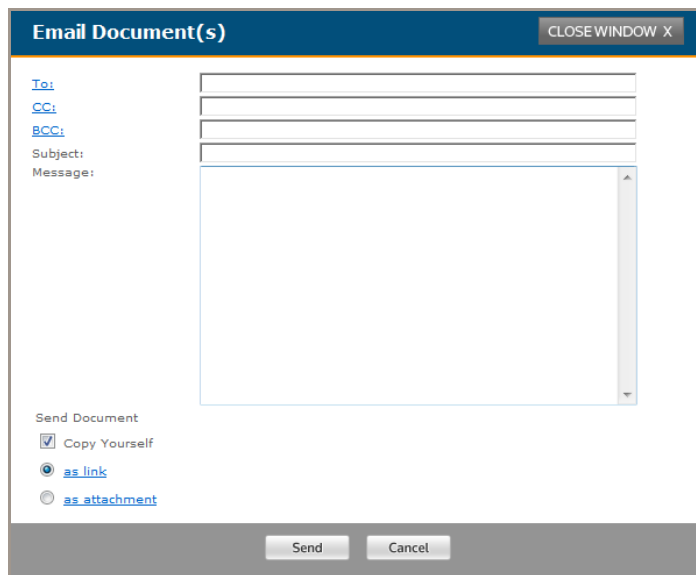
- 1 Select one or more documents to email, then right-click and select **Email Documents Using Outlook**.
- 2 Select one of three options:
  - > **Native Format:** Files are sent as attachment in their native format (e.g., Word, Excel).
  - > **Zip:** Files are sent as an attachment in their native format as a single zip file.
  - > **Link:** A link to the documents is provided in the email. Only recipients with login rights to FileRoom will have access to these files.
- 3 Type the recipients' email addresses, a subject line, and a message.
- 4 Click **Send**.

## EMAILING DOCUMENTS DIRECTLY FROM FILEROOM

You can email documents directly from FileRoom. However, you will be required to use your own email client. We recommend that you check with your system administrator for your company's email policy before emailing documents from FileRoom.

To email documents directly from FileRoom, complete the following steps.

- 1 Select one or more documents to email, then right-click and select **Email Documents Using FileRoom**. The **Email Document(s)** dialog box appears.



The screenshot shows a dialog box titled "Email Document(s)" with a "CLOSE WINDOW X" button in the top right corner. The dialog contains the following fields and options:

- To:** [Empty text box]
- CC:** [Empty text box]
- BCC:** [Empty text box]
- Subject:** [Empty text box]
- Message:** [Large empty text area with a vertical scrollbar]
- Send Document** section:
  - Copy Yourself
  - as link
  - as attachment
  - as attachment
- Buttons: **Send** and **Cancel**

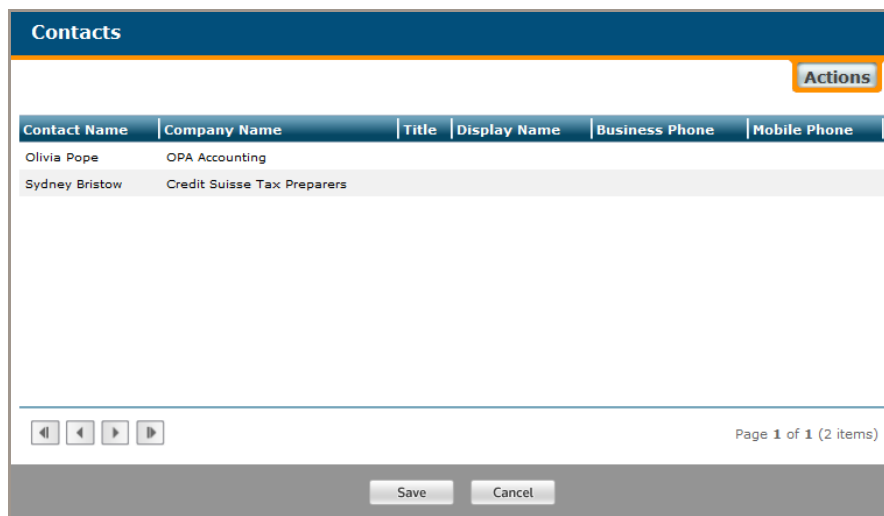
- 2 Type the recipients' email addresses, a subject line, and a message. By default, FileRoom copies on this email so you have a record of what was sent.

- 3 Select one of two options:
  - > **As link:** A link to the documents is included in the email. Only recipients with login rights to FileRoom will have access to these files.
  - > **As attachment:** Files are sent as attachment in their native format.
- 4 Click **Send**.

## EDITING THE FILEROOM ADDRESS BOOK

You can create an address book within FileRoom for contacts that you email frequently. To do so, complete the following steps.

- 1 Select one or more documents to email, then right-click and select **Email Documents Using FileRoom**. The **Email Document(s)** dialog box appears.
- 2 Click the **To**, **Cc**, or **Bcc** link. The **Contacts** dialog box appears.



- 3 Click **Actions**, then select one of the following options:
  - > Add Contact
  - > Modify Contact
  - > Delete Contact(s)
  - > Export Contacts.

The **Manage Contact** dialog box appears.

Manage Contact

Company:	<input type="text" value="Credit Suisse Tax Preparers"/>
Name:	<input type="text" value="Sydney Bristow"/>
Title:	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>
E-Mail:	<input type="text" value="sydney.bristow@creditsuisseTP.com"/>
Business Phone:	<input type="text"/>
Phone Ext:	<input type="text"/>
Business Fax:	<input type="text"/>
Mobile Phone:	<input type="text"/>
Display Name:	<input type="text"/>

- 4 Complete the information in each field (blue fields are required), then click **Save**. The information for the contact you added or modified appears in the **Contacts** dialog box. If you deleted a contact, the contact information is removed from the **Contacts** dialog box.
- 5 Click **Save** to save your work.

## PERFORMING OTHER DOCUMENT ACTIONS

Within FileRoom, you can perform different actions for each document.

### COPYING DOCUMENTS

You can copy documents from FileRoom to a new location.

To copy documents, complete the following steps.

- 1 Select one or more documents to copy, then right-click and select **Copy Documents**. The **Copy Documents** page appears.

**FILEROOM**
THOMSON REUTERS Logout

**Copy Document(s)** [Show Search](#)

Tax Type:

Year:

Period:

Entity Name:

Entity Number:

Jurisdiction:

File Section:

Document Type:

Description:

Document Date:

Documents 1 - 10 of 10 | Previous Page | Page 1 of 1 | Next Page

<input type="checkbox"/>	Type	Tax Type	Year	Period	Entity Name
<input type="checkbox"/>		ANNUAL REPORT	2011	12/31	FM ASSOCIATES, INC
<input checked="" type="checkbox"/>		FEDERAL INCOME	2010	1/31	ABC CORP
<input type="checkbox"/>		FEDERAL INCOME	2014	12/31	ABC CORP
<input type="checkbox"/>		FEDERAL INCOME	2012	12/31	FM ASSOCIATES, INC
<input type="checkbox"/>		FEDERAL INCOME	2009	12/31	JOE JACKSON
<input type="checkbox"/>		FEDERAL INCOME	2009	12/31	T.R. HADEN, INC. AND SUBSIDIARIES
<input type="checkbox"/>		FEDERAL INCOME	2009	1/31	TRACTOR SALES, INC
<input type="checkbox"/>		INCOME TAX	2012	6/30	AUSTRALIA CORPORATION
<input checked="" type="checkbox"/>		STATE INCOME	2011	6/30	ABEX, INC.
<input type="checkbox"/>		STATE INCOME	2011	1/31	ACME TRUCKING, INC.

The check box and rows in brown indicate the documents that you selected to copy

- From the **Copy Documents** page, enter any index values that differ from the index values used for original document.

**NOTE:** If you select multiple documents and the documents have different index values, type the unique index values in the blue (required) fields.

- Click **Save**. The original document remains unchanged.

**IMPORTANT!** If you delete the original document after copying, all history for this document will be lost for that document.

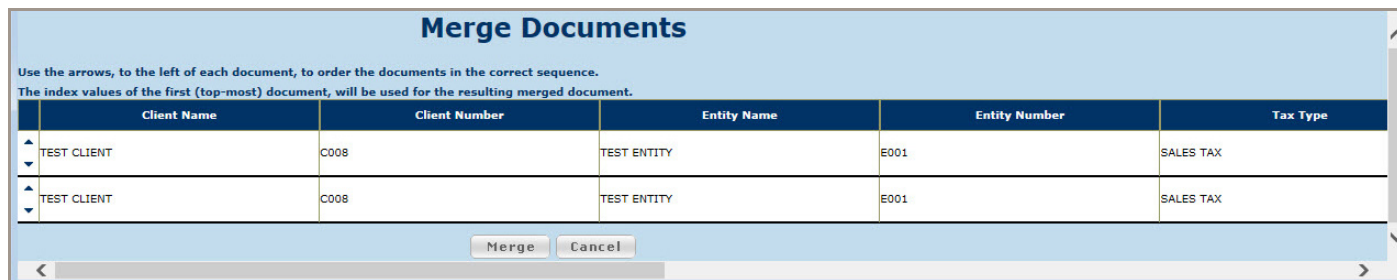
## MERGING PDF FILES

To assist you in updating or grouping related documents, you can merge PDF files. During the merge process, FileRoom locks the selected documents to prevent editing. Documents are then merged in a specified order that you define, and the index values of the first document are assigned to the new merged document. Any bookmarks set up are maintained.

**NOTE:** Merged documents are limited to 12 PDF files and a total of 50 MB.

To merge two or more PDF files, complete the following steps.

- Select two or more PDF files to merge, then right-click and select **Merge PDFs**. The **Merge Documents** page appears.



- Click the up and down arrows in the far left column to arrange the documents in your preferred sequence. The index information from the document at the top of the list will be assigned to the merged document.
- Click **Merge**.

## APPENDING PAGES TO A PDF FILE

Instead of creating a new PDF file, you can add pages to an existing file by appending the PDF file.

To append pages to an existing PDF file, complete the following steps.

- Select the document to which you want to add pages, then right-click and select **Append Pages to PDF**.
- Print the barcode cover page, and fill in the required information.
- Send the document to the scan station to be scanned into FileRoom.



**NOTE:** As an alternative to sending the document to a scan station, we recommend that you use the “TaxSort” feature. The “TaxSort” feature uses OCR (Optical Character Recognition) to identify 1040 source documents, and recognizes many document types, including W-2s, 1099s, K-1s, brokerage statements. After identifying documents, FileRoom organizes them into a PDF file with pre-configured bookmarks.

## MOVING DOCUMENTS TO A DIFFERENT DRAWER

If necessary, you can move documents from one drawer to another.

To move documents to a new drawer, complete the following steps.

- 1 Select the documents that you want to move, then right-click and select **Move Document**. The **Move Document** page appears.
- 2 From the **Drawers** list, select the drawer where you want to move the documents.

The screenshot displays the FileRoom interface for moving a document. On the left, the 'Move Document' form is visible, with the 'Drawers' dropdown set to 'Tax'. The 'Document Date' is set to 9/29/2015. On the right, a table titled 'Project - USER CONFERENCE' shows a list of documents. An orange callout box points to the 'Entity Name' field in the form, stating: 'Index values change depending on the drawer that you select'.

<input type="checkbox"/>	Type	Document Type	Description
<input checked="" type="checkbox"/>		REPORT	DEFAULT COVER SHEET BIO
<input type="checkbox"/>		USER CONFERENCE	INSTRUCTOR RESPONSIBLE FOR SLIDES
<input type="checkbox"/>		USER CONFERENCE	JACK N BOX SOW

- 3 Complete any required index values for the document in the new drawer.
- 4 Select the **Delete Source Document** check box to remove the document from the original drawer. This step is optional.
- 5 Click **Save**.

## RE-INDEXING DOCUMENTS

You can correct any filing errors by re-indexing your documents.

To re-index documents, complete the following steps.

- 1 Select the documents you wish to re-index, then right-click and select **Re-Index Documents**. The **Re-Index Document(s)** page appears.

The screenshot shows the FileRoom interface. On the left is a 'Re-Index Document(s)' form with fields for Project, Document Type, Description, and Date, along with 'Clear' and 'Save' buttons. On the right is a 'Projects' table with columns for checkboxes, Type, Project, and Document Type. The table contains four rows, with the last row selected.

	Type	Project	Document Type
<input type="checkbox"/>		USER CONFERENCE	REPORT
<input type="checkbox"/>		USER CONFERENCE	USER CONFERENCE
<input type="checkbox"/>		USER CONFERENCE	USER CONFERENCE
<input checked="" type="checkbox"/>		WORKPLACE ETHICS TRAINING	AGREEMENT

- 2 Modify the index information as needed.

**NOTE:** Make sure that you enter information only in the fields that you wish to change. Index values that should remain the same can be empty.

- 3 Click **Save**.

## DELETING DOCUMENTS

To delete a document, complete the following steps.

- 1 Select one or more documents to delete, then right-click and select **Delete Documents**. FileRoom asks you to confirm that you want to delete the documents.
- 2 Click **OK**.

**NOTE:** All audit information will be deleted with the document.

## EXPORTING DOCUMENTS

You can export single documents from FileRoom. To export more than one document, click **Copy to Laptop** instead. Data for exported documents is included in the "Document Tracking" report.

**NOTE:** The **Export Document** option is different from the **Edit Document** option. We recommend that you use the **Export Document** option only for reviewing documents offline or for reference purposes—not for modifying documents. If you wish to modify a document, use the **Edit Document** option instead.

To export a document, complete the following steps.

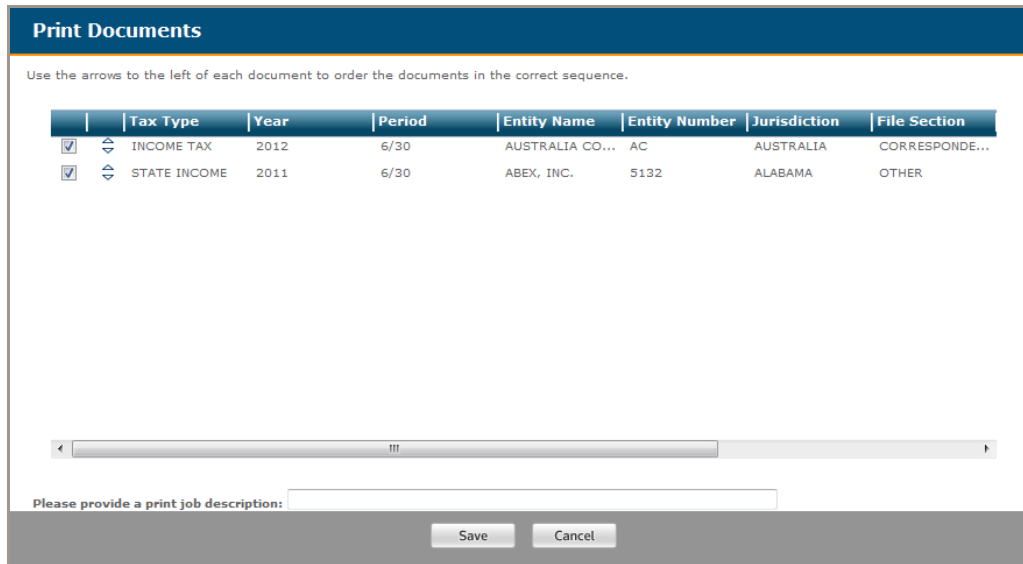
- 1 Select a document to export, then right-click and select **Export Document**. A message appears and asks if you want to open or save the file.
- 2 Click **Open** or **Save** to export a copy of the FileRoom document to your computer.

## PRINTING PDF FILES IN BULK

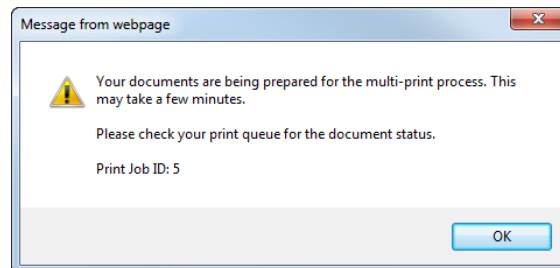
You can print up to 12 PDF files (up to 50 MB) at a time.

To print PDF files in bulk, complete the following steps.

- 1 Select two or more PDF files to print, then right-click and select **Print Documents**. The **Print Documents** dialog box appears.



- 2 Click the up and down arrows to specify the order in which to wish to print the documents.
- 3 Type a description of the print job. This field is required.
- 4 Click **Save**. A message appears and confirms that your documents are being prepared for printing. Additionally, FileRoom provides a Print Job ID for your print job within this message.



Click **OK** to close the message.

- 5 Click the **Printer** icon at the top of the FileRoom page or right-click one of the documents selected to print, then click **View Print Queue**.

Type	Tax Type	Year	Period	Entity Name	Entity Number	Jurisdiction	File Section
	ANNUAL REPORT	2011	12/31	FM ASSOCIATES, INC	3331	NEW JERSEY	INCOME
	FEDERAL INCOME	2010	1/31	ABC CORP	12345678	ARKANSAS	
	FEDERAL INCOME	2014	12/31	ABC CORP	12345678	FEDERAL	TAX RETURN
	FEDERAL INCOME	2012	12/31	FM ASSOCIATES, INC	3331	FEDERAL	WORKPAPERS
	FEDERAL INCOME	2009	12/31	JOE JACKSON	0001	ALABAMA	INSOURCE ADMIN
	FEDERAL INCOME	2009	12/31	T.R. HADEN, INC. AND SUBSIDIARIES	2564	FEDERAL	DEPRECIATION / FIXE...
	FEDERAL INCOME	2009	1/31	TRACTOR SALES, INC	4789	-	-
<input checked="" type="checkbox"/>	INCOME TAX	2012	6/30	AUSTRALIA CORPORATION	AC	AUSTRALIA	CORRESPONDENCE
<input checked="" type="checkbox"/>	STATE INCOME	2011	6/30	ABEX, INC.	5132	ALABAMA	OTHER
<input type="checkbox"/>	STATE INCOME	2011	1/31	ACME TRUCKING, INC.	603	NJ	WORKPAPERS

The print queue lists all jobs and their status. You can reprint these jobs or save them in their merged state. Print jobs remain in the queue for 30 days.

Print Job ID	User ID	Print Job Description	Document Status	Submitted On	Documents in Batch
5	Jake Ballard	2012 Print Job	Waiting	9/30/2015 10:35:36 AM	2

Page 1 of 1 (1 items)

NOTE: Documents in the print queue will be purged after 30 days

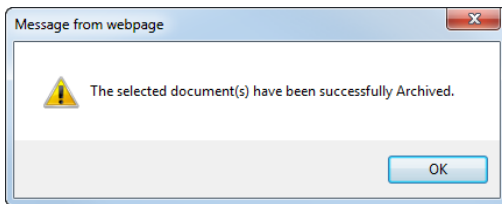
Delete Cancel


## ARCHIVING DOCUMENTS

Users with proper permissions can archive documents. You can view archived documents and search for content within them, but cannot modify the documents or associated index values.

To archive documents, complete the following steps.

- 1 Select one or more documents to archive, then right-click and select **Archive Documents**. A message appears and confirms that the selected document has been archived.



- 2 Click **OK**. The document's icon appears with a red and white **A**  to indicate that the file is archived.

If you need to remove the "Archive" status, complete the following steps.

- 1 Select the documents to unarchive, then right-click and select **Remove Archive Status**. A message appears and confirms that the document has been unarchived.
- 2 Click **OK**. The document's icon reverts to normal without the red and white A.

## VIEWING A DOCUMENT'S HISTORY

Viewing a document's history allows you to track all indexing, viewing, editing, emailing, and exporting for a selected document. You can view document history for one document at a time.

To view a document's history, select a document, then right-click and select **Document History**. A window appears and allows you to view the document attributes.

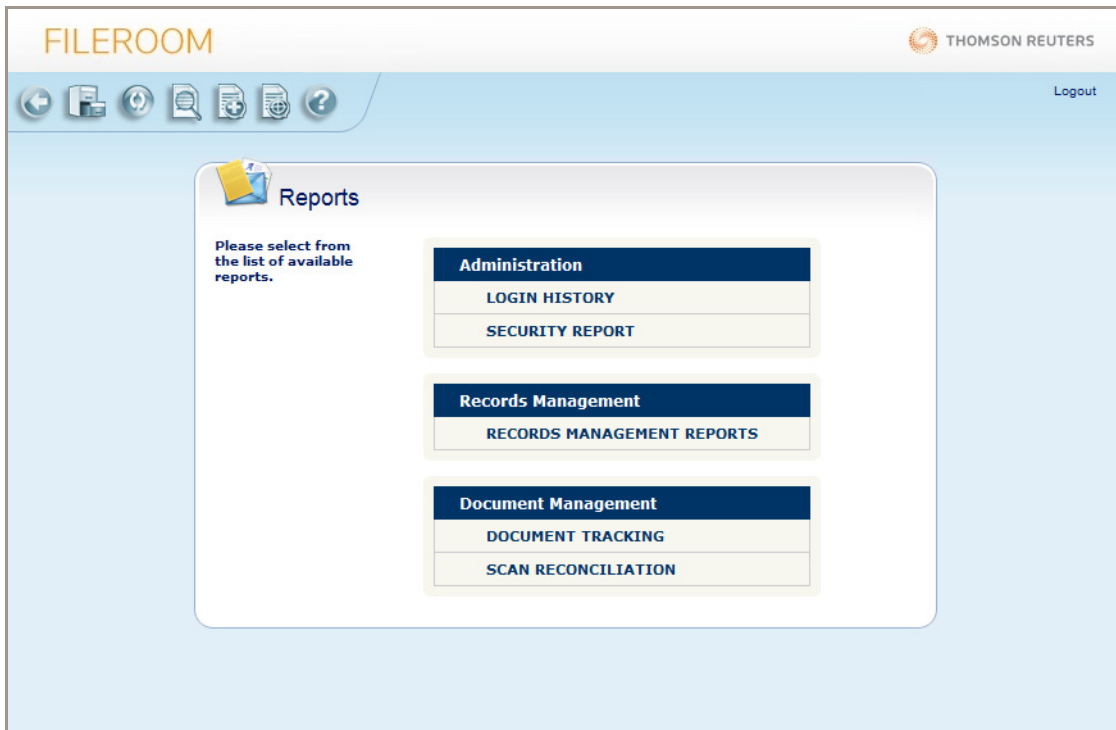
History of Document # 0000000QW		
Date and Time	User	Action
9/30/2015 1:49:33 PM	Jake Ballard	Removed Archive Flag
7/23/2014 4:08:29 PM	Jake Ballard	Viewed Document
6/26/2014 2:49:02 PM	Jake Ballard	Archived
6/26/2014 2:46:13 PM	Jake Ballard	Filed
6/26/2014 2:46:11 PM	Jake Ballard	Indexed
<b>Tax Type</b>	<b>FEDERAL INCOME</b>	
<b>Year</b>	<b>2014</b>	
<b>Period</b>	<b>12/31</b>	
<b>Entity Name</b>	<b>ABC CORP</b>	
<b>Entity Number</b>	<b>12345678</b>	
<b>Jurisdiction</b>	<b>FEDERAL</b>	
<b>File Section</b>	<b>TAX RETURN</b>	
<b>Document Type</b>		
<b>Description</b>	<b>2014 FORM 1065</b>	
<b>Document Date</b>	<b>2/10/2014</b>	
<b>Status</b>	<b>Unassigned</b>	
<b>Assigned To</b>		


## WORKING WITH FILEROOM REPORTS

FileRoom allows you to generate and view the following types of reports:

- **“Document Tracking” report**
- **“Scan Reconciliation” report**

You can generate each report from the **Reports** page. To access the **Reports** page, from the FileRoom page, click **Reports**.



**NOTE:** The “Document Tracking” report can be generated from either the FileRoom page by clicking the **Document Tracking Report** icon  or from the **Reports** page.

**IMPORTANT!** Administrators and scan operators will be able to view reports on all documents, regardless of user. Non-administrator users will be able to view reports on their documents only.

### GENERATING THE “DOCUMENT TRACKING” REPORT

The “Document Tracking” report includes information about the documents within a selected drawer, including a document’s status, who added the document to FileRoom, and when the document was last modified.

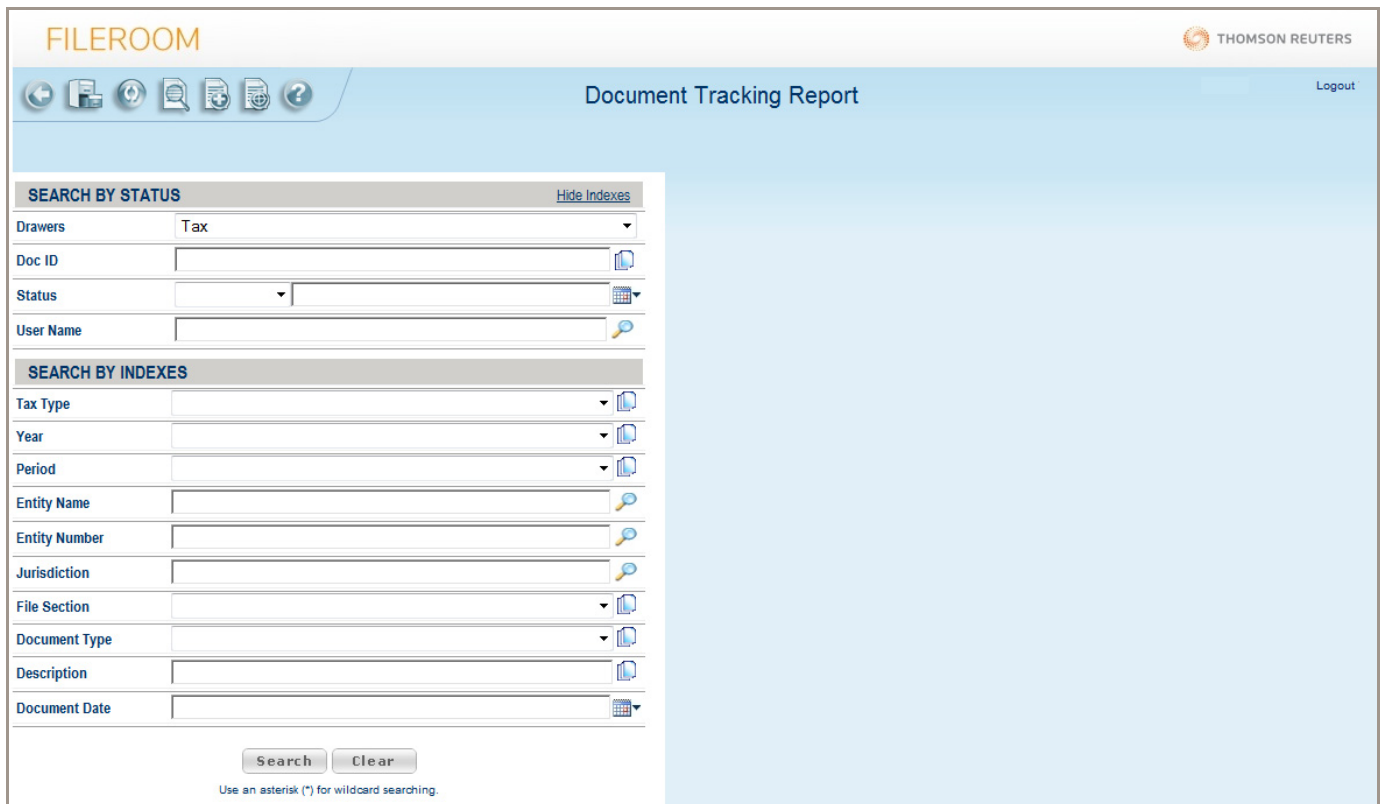
The “Document Tracking” report menu allows you to

- Void or reprint barcodes
- Reset scanned documents

- Override checked out documents
- Change “Archive” status

To generate and view the “Document Tracking” report for a drawer, complete the following steps.

- 1 From the FileRoom page, click **Reports**. The **Reports** page appears.
- 2 In the **Document Management** section, click **Document Tracking**. The **Document Tracking Report** page appears.



**FILEROOM** THOMSON REUTERS

Document Tracking Report Logout

**SEARCH BY STATUS** [Hide Indexes](#)

Drawers Tax

Doc ID

Status

User Name

**SEARCH BY INDEXES**

Tax Type

Year

Period

Entity Name

Entity Number

Jurisdiction

File Section

Document Type

Description

Document Date

Search Clear

Use an asterisk (\*) for wildcard searching.

- 3 From the **Drawers** list, select a drawer.
- 4 Add index values to one or more fields.
- 5 Click **Search**. FileRoom generates a “Document Tracking” tracking report for the documents that meet your search criteria.

FILEROOM											THOMSON REUTERS
Document Tracking Report											Logout
Customize View   Documents 1 - 20 of 474   Previous Page   Page 1 of 24   Next Page											
Type	DocID	Status	User Name	Status DateTime	Tax Type	Year	Period	Entity Name	En Nu		
	00000000SS	Filed	B S Preethy	8/13/2015 11:31:33 AM	ANNUAL REPORT	2016	1/31	ACME SIDINGS	002		
	00000000SR	Filed	B S Preethy	8/13/2015 11:28:38 AM	ANNUAL REPORT	2016	1/31	ACME SIDINGS	002		
	00000000SQ	Filed	B S Preethy	6/26/2015 8:37:23 AM	ANNUAL REPORT	2016	1/31	ACME SIDINGS	002		
	00000000SP	Filed	Jake Ballard	3/17/2015 1:06:41 PM	FEDERAL INCOME	2010	4/30	APEX DISTRIBUTION (NZ CTB...	703		
	00000000R2	Filed	sam.wftuser	10/6/2014 7:09:44 AM	ANNUAL REPORT	2009	1/31	ACMED EDUCATION (INDIA) L...	662		
	00000000QZ	Archived	Annelise Keating	7/15/2014 2:27:47 PM	INCOME TAX	2014	12/31	ABC CORP	1234		
	00000000QY	Filed (local)	Annelise Keating	6/26/2014 2:47:53 PM	FEDERAL INCOME	2014	12/31	ABC CORP	1234		
	00000000QX	Filed (local)	Annelise Keating	6/26/2014 2:47:20 PM	FEDERAL INCOME	2014	12/31	ABC CORP	1234		
	00000000QW	Filed	Annelise Keating	6/26/2014 2:46:13 PM	FEDERAL INCOME	2014	12/31	ABC CORP	1234		
	00000000QN	Filed	Jake Ballard	11/8/2013 2:19:24 PM	FEDERAL INCOME	2010	4/30	APEX DISTRIBUTION (NZ CTB...	703		
	00000000QH	Barcoded	Jake Ballard	7/19/2013 11:33:00 AM	FEDERAL INCOME	2010	4/30	APEX DISTRIBUTION (NZ CTB...	703		
	00000000QG	Barcoded	Jake Ballard	7/19/2013 11:33:00 AM	FEDERAL INCOME	2010	4/30	APEX DISTRIBUTION (NZ CTB...	703		

## GENERATING THE “SCAN RECONCILIATION” REPORT

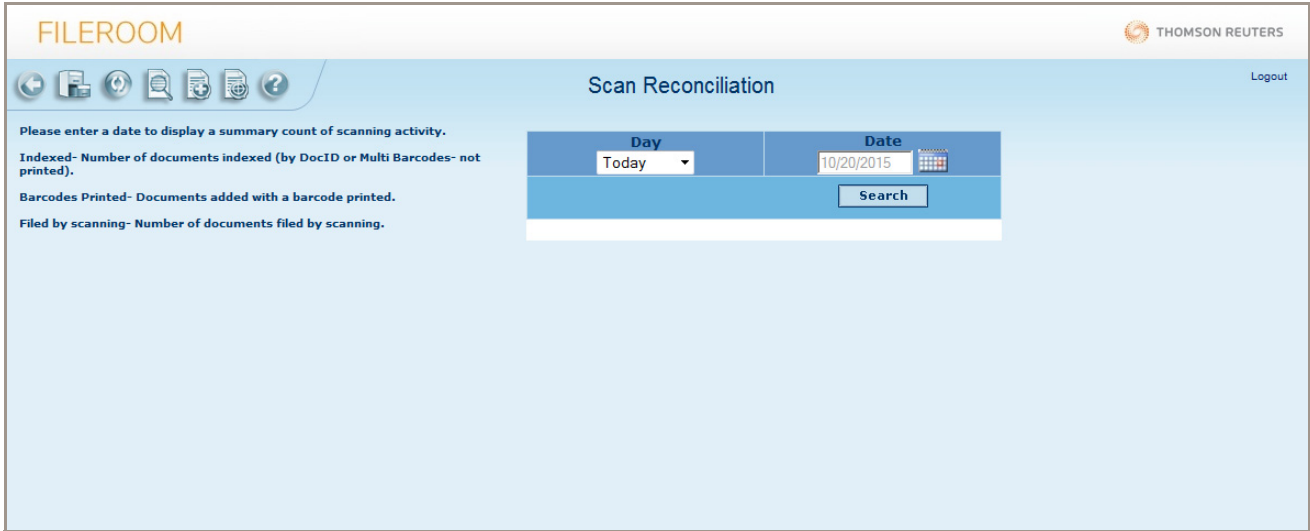
The “Scan Reconciliation” report displays a summary count of any scanning activity related to your FileRoom documents. Activity can include

- **Indexed documents:** Number of documents indexed either by Document ID or multi-barcodes that have not been printed
- **Barcodes printed:** Documents added with a barcode printed
- **Filed by scanning:** Number of documents filed by scanning

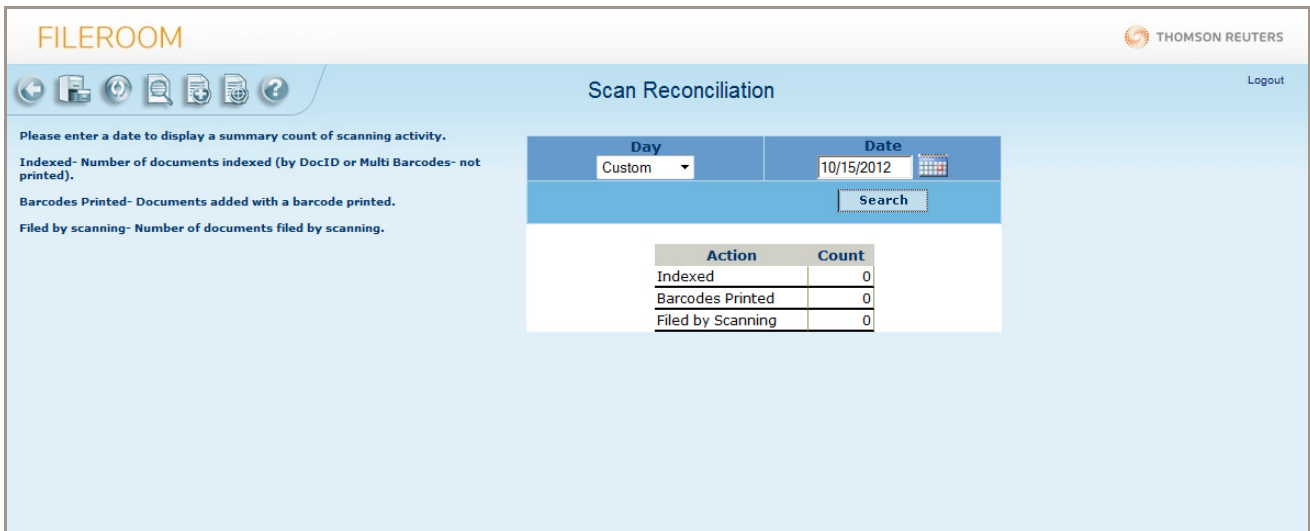
To generate and view the “Scan Reconciliation” report for a drawer, complete the following steps.

- 1 From the FileRoom page, click **Reports**. The **Reports** page appears.
- 2 In the **Document Management** section, click **Scan Reconciliation**. The **Scan Reconciliation** page appears.





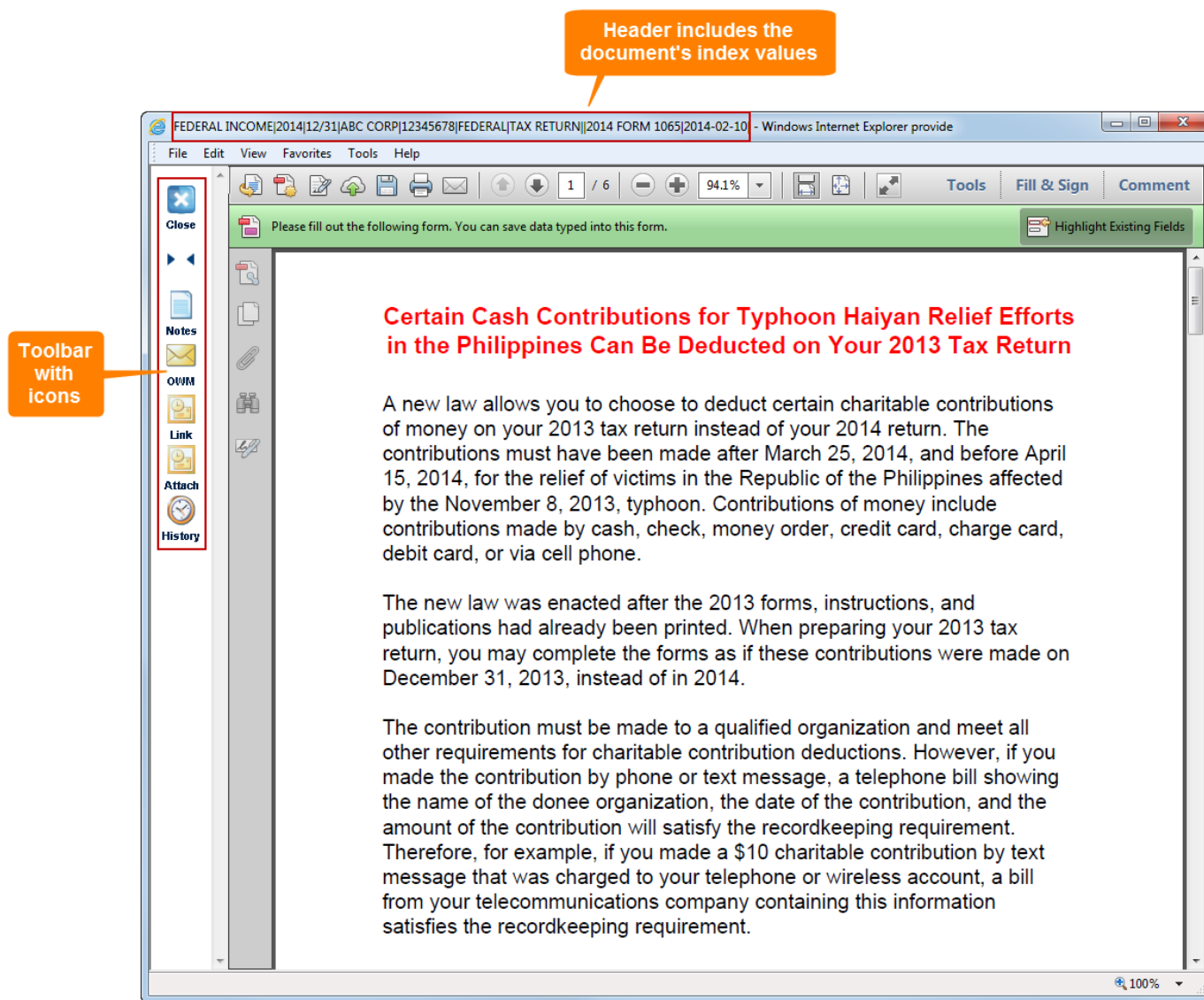
- 3 In the **Day** list, select the day for which you wish to view a summary count of scanning activity. Options include **Today**, **Yesterday**, and **Custom**.
- 4 If you selected **Custom** in step 3, in the **Date** field, either type the day in mm/dd/yyyy format or click the Calendar icon.
- 5 Click **Search**. The **Scan Reconciliation** page refreshes and shows a list of all results that match your search criteria.










## UNDERSTANDING THE FILEROOM VIEWER TOOLBAR

The FileRoom Viewer includes several features that you can use when viewing documents. To open the FileRoom Viewer, double-click a document.

When the document appears, the window's header displays the index values associated with the document. In the example below, notice how the document includes the Federal Income, 2014, 12/31, ABC Corp index values among others.



Each feature is represented by an icon on the toolbar that appears on the FileRoom Viewer's left side. Refer to the following table to learn more about each feature.

TOOLBAR ICON	DEFINITION
	<p>Click <b>Close</b> to close the FileRoom Viewer and return to the <b>Search for Documents</b> page.</p>
	<p>Click <b>Show/Hide Index</b> to display the index fields associated with the document. Click the icon again to hide the index fields.</p>
	<p>Click <b>Notes</b> to open the <b>Notes</b> dialog box and create, edit, or delete a note related to the selected document.</p>
	<p>Click <b>OWM</b> to open the <b>Email Documents</b> dialog box and email a document from FileRoom.</p>
	<p>Click <b>Link</b> to send the selected FileRoom document as a link within a Microsoft Outlook email message.</p>
	<p>Click <b>Attach</b> to send the selected FileRoom document as an attachment within a Microsoft Outlook email message.</p>
	<p>Click <b>History</b> to open the <b>Document History</b> dialog box and view the history for the selected document.</p>

## GETTING ADDITIONAL HELP WITH FILEROOM

### CONTACTING SUPPORT

To request help for any WorkFlow Tools application, from the Platform, select **Help**, then select **Product Support**. Click the tile for your application to launch a page with additional links to release notes, guides, training options, and Support contact information.

### VIEWING SYSTEM REQUIREMENTS

For more information regarding the current system requirements for the 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

# APPENDIX: BEST PRACTICES FOR ADDING DOCUMENTS

Refer to the following table for tips on adding documents to FileRoom from different sources.

SOURCE DOCUMENT TYPE	SCANFLOW	USE THE S BUTTON ON ADOBE TOOLBAR	PRINT TO FILEROOM	BROWSE HARD DRIVE/NETWORK	ADD FROM MICROSOFT WORD	ADD FROM MICROSOFT EXCEL	ADD FROM ADOBE ACROBAT	ADD FROM EMAIL	IMPORT A FILE	SEND TO FILEROOM (RIGHT-CLICK)	SEND TO FILEROOM (DESKTOP ICON)
PAPER DOCUMENT (MULTI-PAGE)	P		S								
PAPER DOCUMENT (SINGLE PAGE)	S	P									
ELECTRONIC FILES			P	S	S	P	S	P	S	S	S
READ-ONLY DOCUMENTS (NON-EDITABLE)			P						S		
MICROSOFT WORD FILES				S	P				S	S	S
MICROSOFT EXCEL FILES				S		P			S	S	S
PDF FILES				S			P		S	S	S
OUTLOOK EMAIL (.MSG FILE TYPE)			S					P			
EMAIL ATTACHMENTS SAVED IN ORIGINAL FORMAT								P			

**P** = Our primary recommended method

**S** = Our secondary recommended method