

FileBound – Web Viewer Add Content Instructions

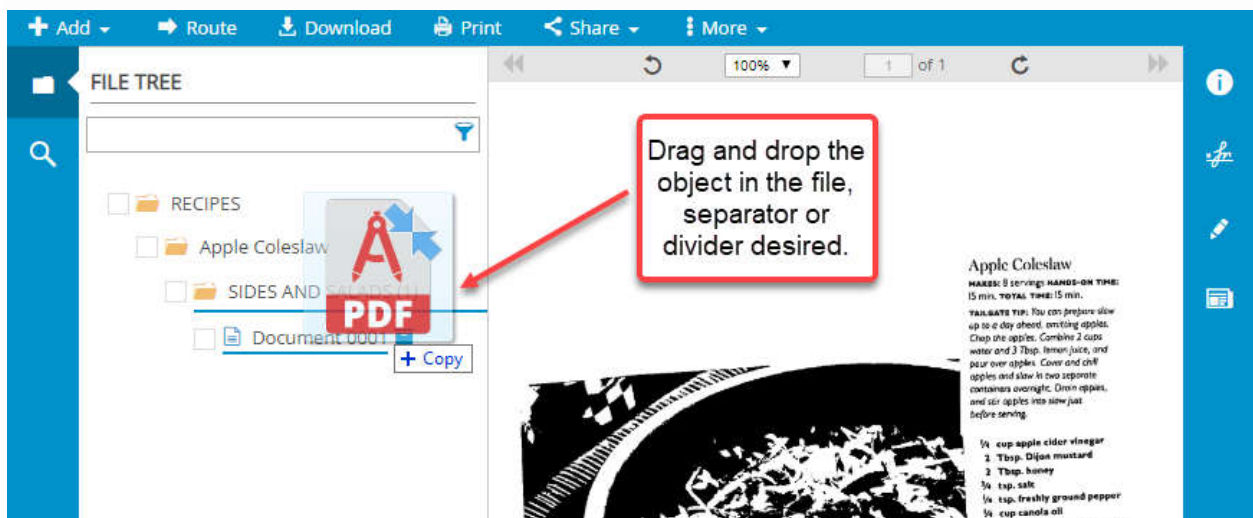
There are many methods to easily add content to FileBound and many of them can be accessed from FileBound’s Web Viewer. Here’s a list of some of these methods.

- Drag and drop
- Upload via Web Viewer + Add dropdown
- Scan via Web Viewer + Add dropdown
- Forms via Web Viewer + Add dropdown
- Forms Processes via Web Viewer + Add dropdown

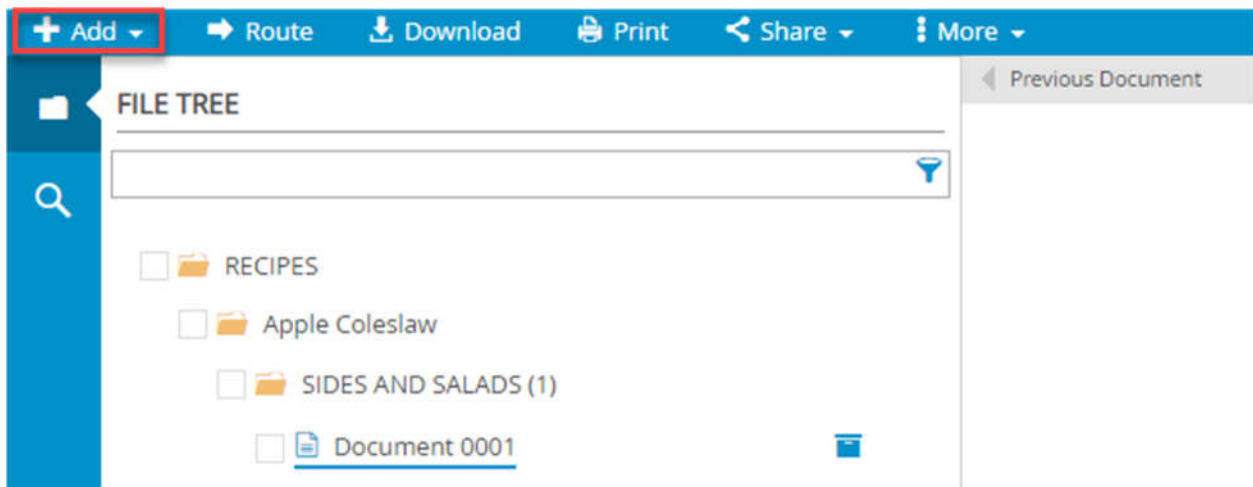
You can find detailed instructions for these methods in the pages that follow.

Dragging & Dropping Objects

From the FileBound Web Viewer you can easily add documents by dragging them and dropping them on a file, separator or divider.



FileBound Web Viewer +Add Tool



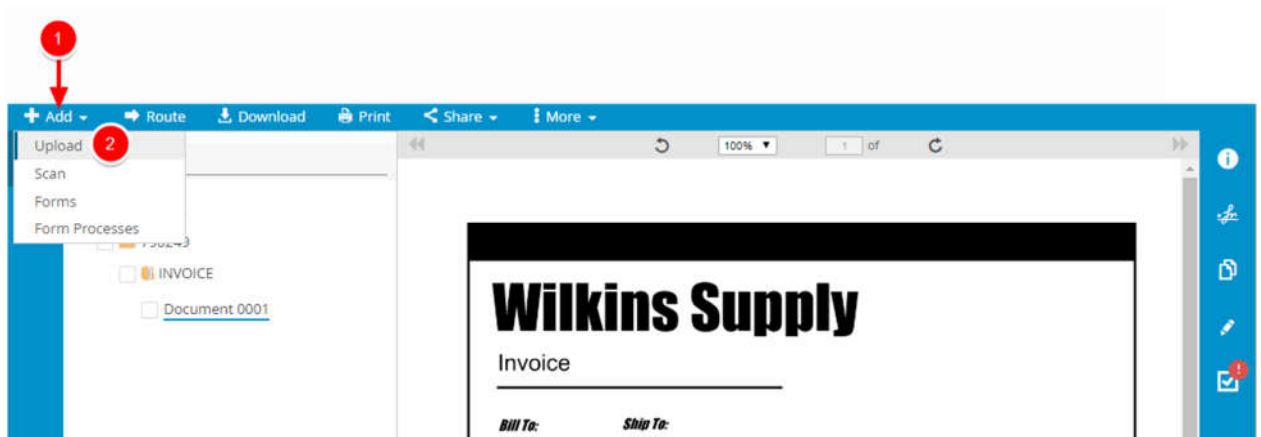
Add: Add documents in the Web Viewer. Select one of the following:

- **Upload:** Upload one or more documents that are saved on your machine or other network drive into the Viewer. See [Upload documents in the Web Viewer](#) below for more information. You can also link to documents that are stored in locations outside of FileBound.
- **Scan:** Scan and then upload the documents into the respective projects. See [Scan pages into the Web Viewer](#) below for more information.
- **Form:** Generate the forms that are designed by the System Administrator for that document. See [Add a form to a file in the Web Viewer](#) for more information.
- **Form Process:** Generate the forms that are designed by the System Administrator for that document. See [Add a form process](#) for more information.

Upload documents in the Web Viewer

You can add documents to a file from the Web Viewer.

1. On the File Toolbar, click **Add**, then click **Upload**.



2. In the **Upload Documents** dialog box, if separators are enabled for the project, select a separator that you want to place the uploaded document in from the **Separator** list.
3. Select a divider that you want to place the uploaded document in from the **Divider** list.

Note: The default separator/divider can be selected from the **Separator** and **Divider** lists regardless of group rights; however, a user who does not have access to the default separator or divider will not be able to view documents that have been uploaded to them.

4. Modify the **Original Date** if needed.
5. Click **Browse** to locate the document(s) you want to upload or move the document(s) to the upload area using a drag-and-drop operation.

6. Click **Save**.

Upload Documents ×

Separator:

Divider:

Original Date:

Drop documents here, or , or

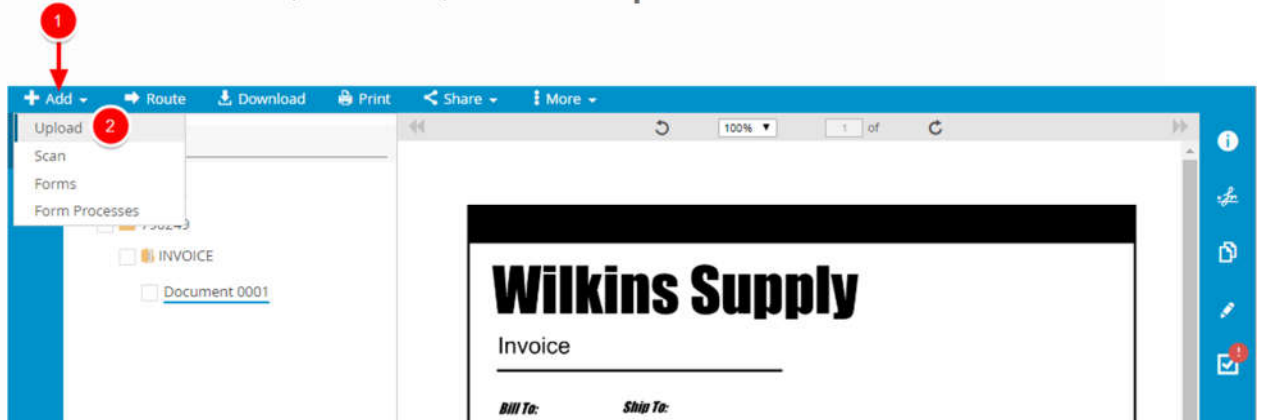
2 documents ready for upload

Add an External Document Link

An external document link can be added to FileBound to reference documents in external locations, such as Google Drive™ or SharePoint® Online.

Use Case: A case manager has received a shared document from another user's SharePoint site. They can add the external document link as a FileBound document so that all case information can be referenced in a single case file.

1. On the File Toolbar, click **Add**, then click **Upload**.

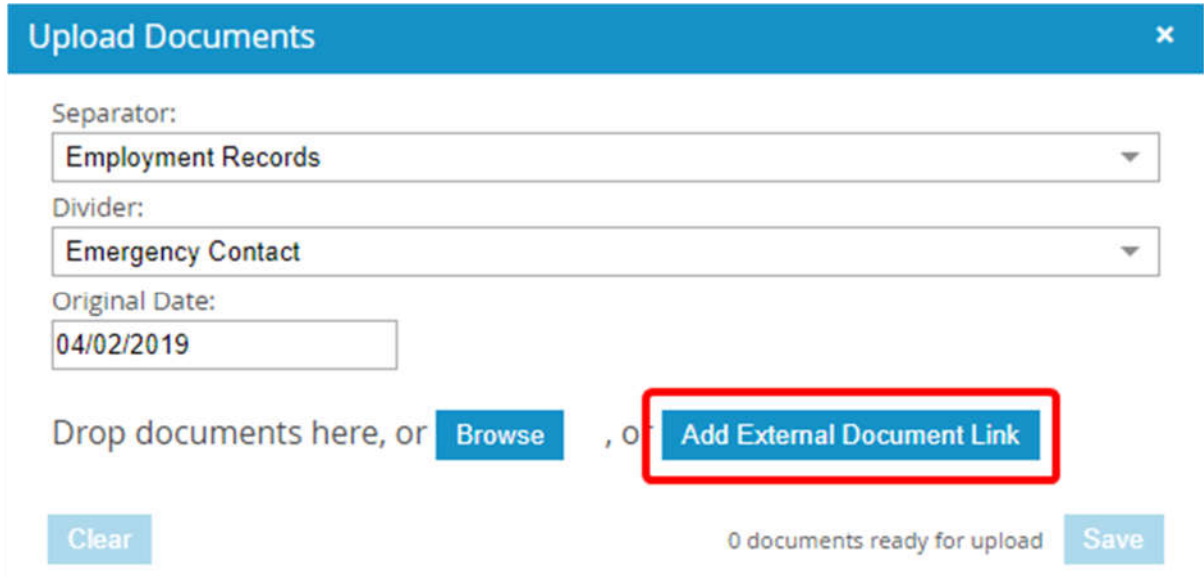


2. In the **Upload Documents** dialog box, if separators are enabled for the project, select a separator that you want to place the external document link in from the **Separator** list.
3. Select a divider that you want to place the external document link in from the **Divider** list.

Note: The default separator/divider can be selected from the **Separator** and **Divider** lists regardless of group rights; however, a user who does not have access to the default separator or divider will not be able to view documents that have been uploaded to them.

4. Modify the **Original Date** if needed.

5. Click **Add External Document Link**.



Upload Documents ×

Separator:
Employment Records

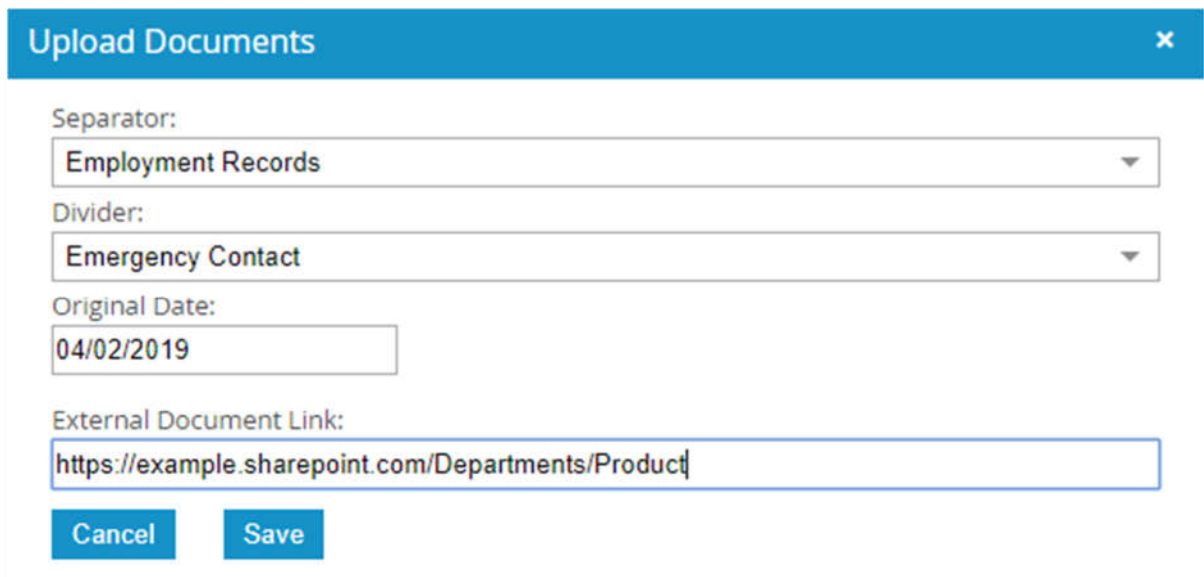
Divider:
Emergency Contact

Original Date:
04/02/2019

Drop documents here, or **Browse**, or **Add External Document Link**

Clear 0 documents ready for upload **Save**

6. Type the URL for the external document in the **External Document Link** field.
7. Click **Save**.



Upload Documents ×

Separator:
Employment Records

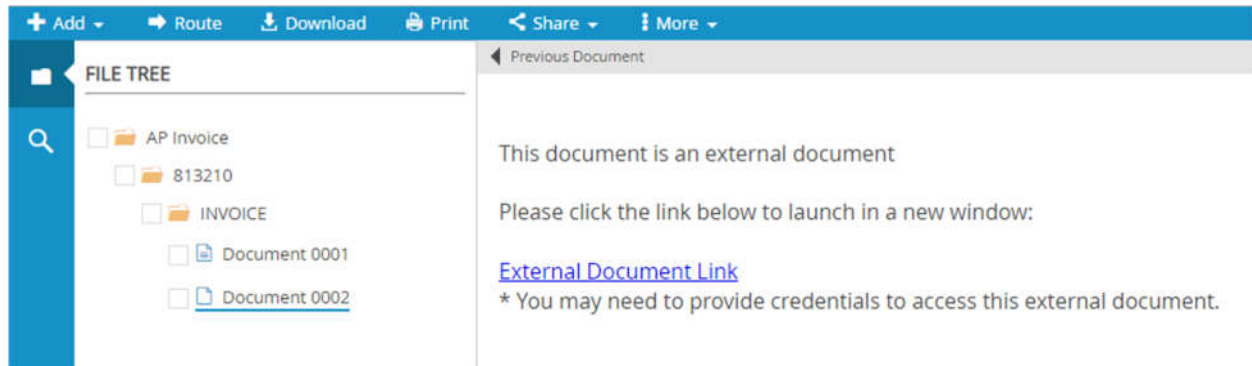
Divider:
Emergency Contact

Original Date:
04/02/2019

External Document Link:
https://example.sharepoint.com/Departments/Product

Cancel **Save**

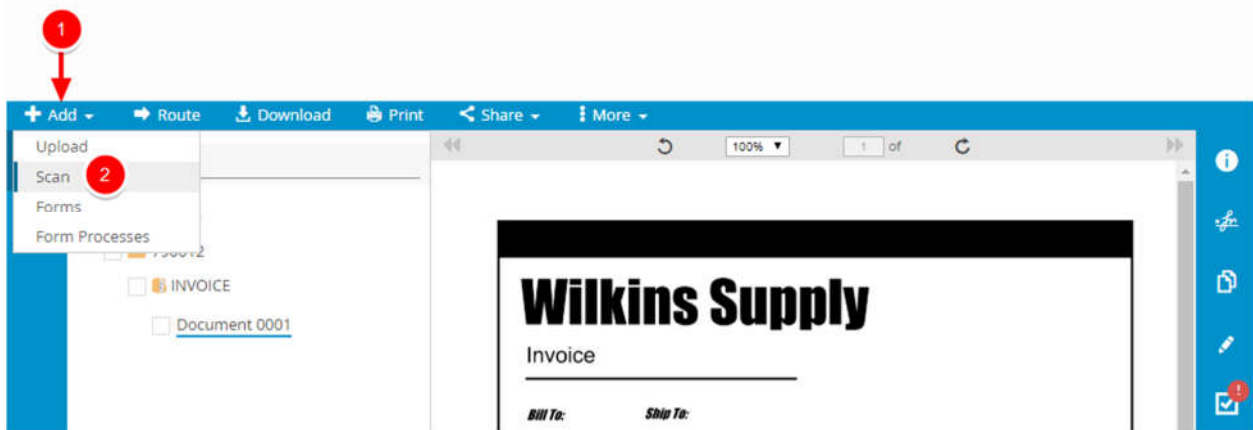
The URL is stored as a document in the File Tree; however, the actual document is not stored in FileBound. Users can access the document by clicking the **External Document Link** hyperlink.



Scan pages into the Web Viewer

You can scan pages into the Web Viewer and then upload them to a project.

1. On the File Toolbar, click **Add**, then click **Scan**.



2. In the **Scan Documents** dialog box, select a separator that you want to place the scanned document in from the **Separator** list.
3. Select a divider that you want to place the scanned document in from the **Divider** list.

Note: The default separator/divider can be selected from the **Separator** and **Divider** lists regardless of group rights; however, a user who does not have access to the default separator or divider will not be able to view documents that have been scanned to them.

4. Click **Scan**.

Scan Documents ×

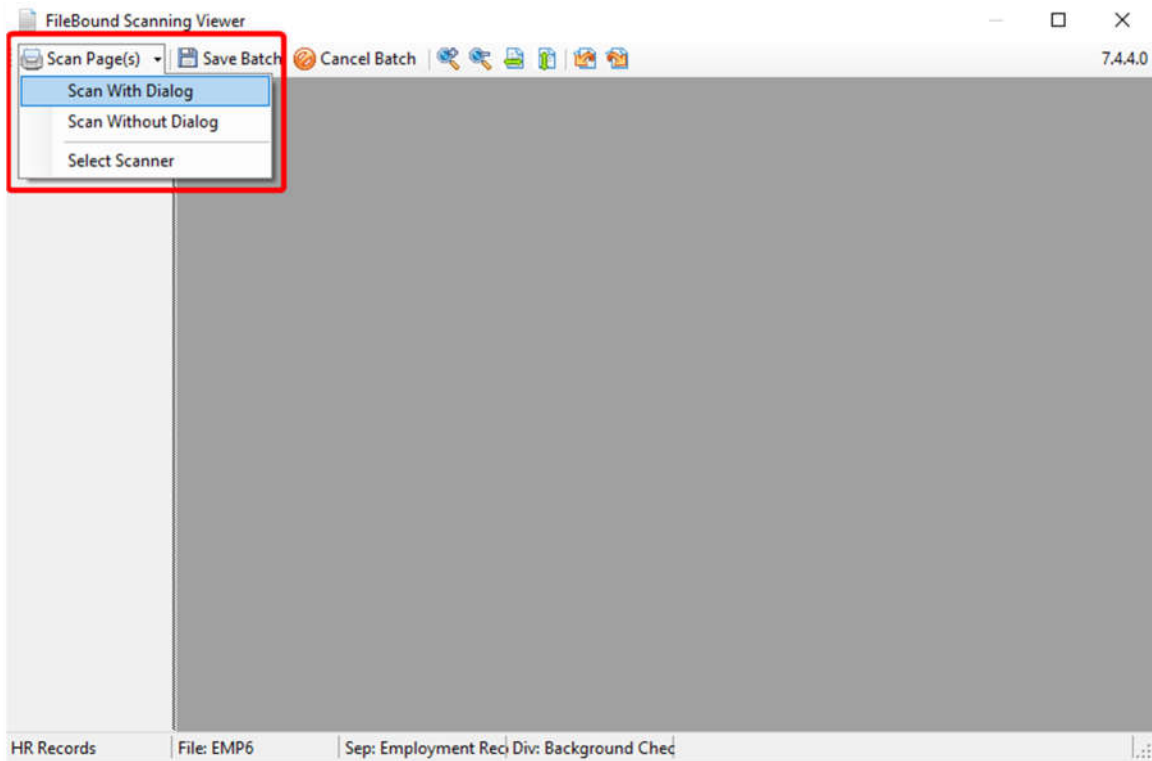
Separator:

Divider:

5. In the **FileBound Scanning Viewer** dialog box, click **Scan Pages(s)** and select one of the following options:

- **Scan With Dialog:** Scans pages into the Web Viewer with the dialog option to configure the scanner settings.
- **Scan Without Dialog:** Scan pages into the Web Viewer with the existing scanner settings.

6. If you are connected to more than one scanning device, click **Select Scanner** to select which scanning device you want to use.



Add a form to a file in the Web Viewer

Forms are generated based on an associated template. A FileBound Administrator uploads a template to be used as a form. Forms can be added in the Web Viewer and Windows Viewer. When the form is added, it is placed under the divider or separator that was designated when the form was set up by an Administrator. If the form is the first document created for the designated divider, then the divider is generated and displayed within the File Tree.

1. On the File Toolbar, click **Add**, then click **Forms**.



2. In the **Select Form** dialog box, click the form you want to add to the file.

Select Form



Select a Form below, or filter the list by searching here

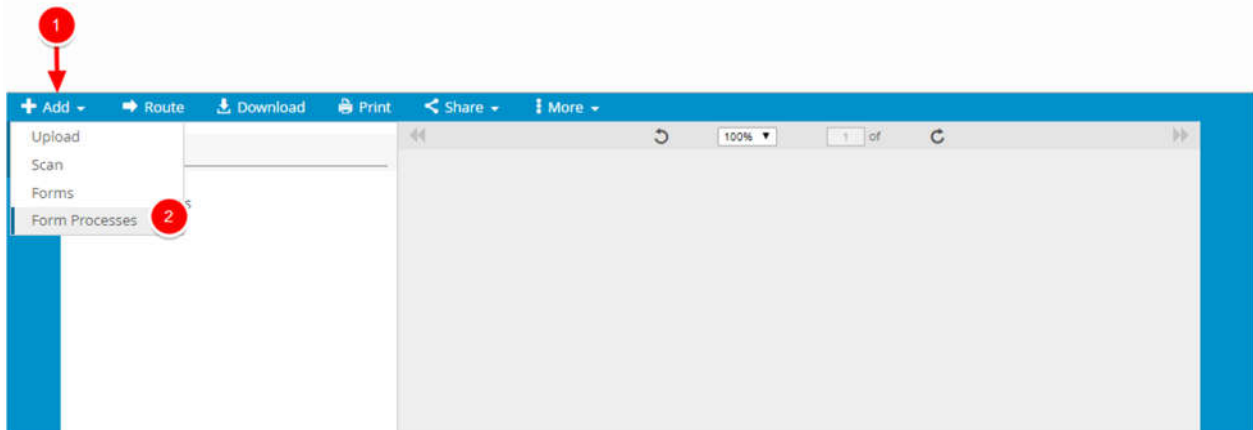
- Assessment Test
- Assessment Test Completed
- BackGround Check
- Direct Deposit
- Drug Test
- Emergency Contact
- Employee Confidential Information
- Exit Interview
- HR Exit Interview Checklist
- HR Onboarding Checklist

The selected form is added to the File Tree and displayed in the document pane. The form is displayed in the default editor of the form template format type. For example, if the form is in Microsoft Word format, then the form opens in the Microsoft Word application within FileBound.

Add a form process

You can run a document in the Web Viewer through a form process.

1. On the File Toolbar, click **Add**, then click **Form Processes**.



2. Select a form process from the list.

