GoFileRoom®

Training Guide Basic User

THOMSON
TAX & ACCOUNTING

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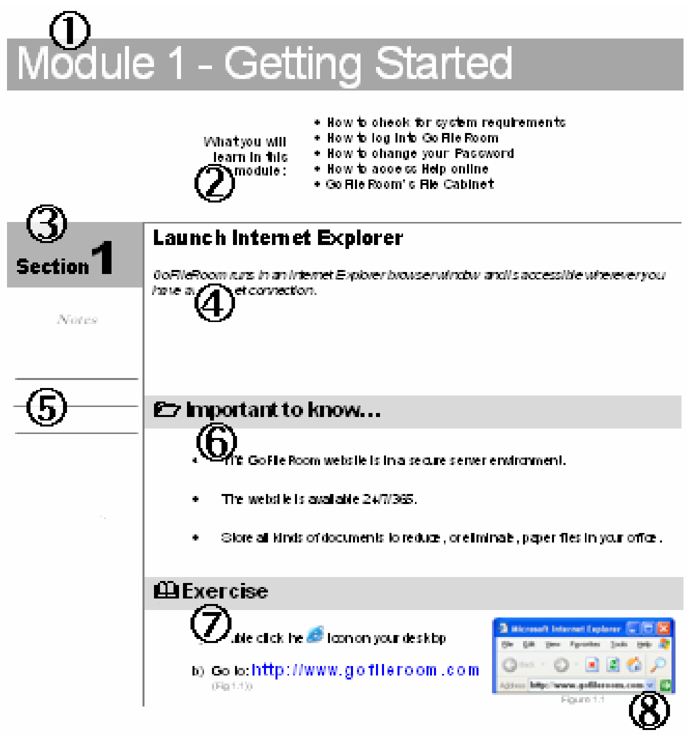
How to Use This Guide

Welcome to our Training Session and congratulations for taking a step towards a paperless environment. At Thomson GoFileRoom, we strive hard to supply quality products and services to document intensive businesses like your firm by providing powerful technology solutions for your document management needs.

This Training Guide is intended to be an aid for our classroom training sessions covering key topics. For complete “How to do it” details, see our extensive Online Help section.

This guide includes various components to help students learn the concepts of our system, as well as the necessary steps to perform job responsibilities in a document intensive industry.

The illustration to the right shows the different sections used in this Training Guide, which are defined below.



① Module 1 - Getting Started

What you will learn in this module: ②
- How to check for system requirements
- How to log into GoFileRoom
- How to change your Password
- How to access Help online
- GoFileRoom's File Cabinet

③ Section 1

Launch Internet Explorer

GoFileRoom runs in an Internet Explorer browser window and is accessible wherever you have a ④ et connection.

Notes ⑤

🗁 **Important to know...** ⑥
- e GoFileRoom website is in a secure server environment.
- The website is available 24/7/365.
- Store all kinds of documents to reduce, or eliminate, paper files in your office.

🕮 **Exercise**

⑦ ble click the icon on your desktop

b) Go to: http://www.gofileroom.com (Fig 1.1)

Figure 1.1 ⑧

① - **Module:** A primary division of the guide for easy reference during and after the class

② - **Key items to learn:** A logical grouping of topics covered in the Module

③ - **Section:** A secondary division of the guide for each key item

④ - **Section title and brief introduction:** A prelude to help students understand section details

⑤ - **Notes:** A place for students to add their own special notes, comments, tips, etc.

⑥ - 🗁 **Important to know:** Specific details that the student should know within each section

⑦ - 🕮 **Exercise:** Key steps to help students learn the process of using the application features

⑧ - **Images:** Graphic illustrations to provide visual support of the trainer’s instructions

We are excited to share our solution based document management system with you. For future reference, enter your support contacts below:

Business Process Owner (the person to ask policy and/or process related questions):

____

Technology Sponsor (the person to contact for technical issues and/or updates):

____

Application Support (the first point of contact for non-policy and non-technical issues):

____

Table of Contents – GoFileRoom

Module 1 - Getting Started

What you will learn in this module:

- **How to check for system requirements**
- **How to log into GoFileRoom**
- **How to change your Password**
- **How to access online Help**
- **The structure of GoFileRoom's File Cabinet**

Section 1

Launch Internet Explorer

GoFileRoom runs in an Internet Explorer browser window and is accessible wherever you have an internet connection.

Notes

Important to know…

- The GoFileRoom website is in a secure server environment.
- The website is available 24/7/365.
- Store all kinds of documents to reduce, or eliminate, files in your office.
- GoFileRoom requires that pop-ups are allowed for the site.

Exercise – Allowing for Pop-Up Windows

a) Double click the icon on the desktop

b) Click on *Tools* in the menu bar

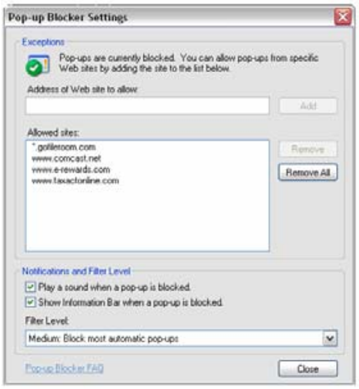
c) Click on *Pop-up Blocker* in the drop down menu

d) Click on *Pop-up Blocker Settings…*

e) Enter **.gofileroom.com* in the *Web sites to allow* box

f) Click the *Add* button

g) Click on Close button (Fig 1.1)



Pop-ups are currently blocked. You can allow pop-ups from specific Web sites by adding the site to the list below.

Address of Web site to allow:

Allowed sites:
*.gofileroom.com
www.comcast.net
www.e-rewards.com
www.taxactonline.com

☑ Play a sound when a pop-up is blocked.
☑ Show Information Bar when a pop-up is blocked.

Filter Level:
Medium: Block most automatic pop-ups

Figure 1.1

Exercise – Trusted Site Set-up

a) With Internet Explorer still Open; click on *Tools*

b) Click on *Internet Options…*

c) Click on the *Security* tab

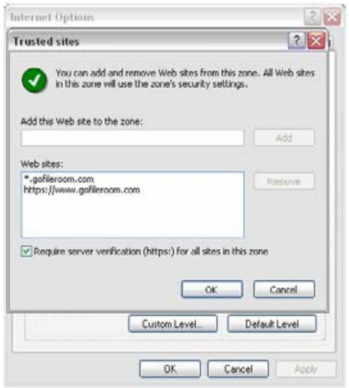
d) Click on the *Trusted sites* icon

e) Click the *Sites…* button

f) Enter **.gofileroom.com* in the Add this Web site box…

g) Click the *Add* button

h) Click the *OK* and *OK* again (Figure 1.2)



You can add and remove Web sites from this zone. All Web sites in this zone will use the zone's security settings.

Add this Web site to the zone:

Web sites:
*.gofileroom.com
https://www.gofileroom.com

☑ Require server verification (https:) for all sites in this zone

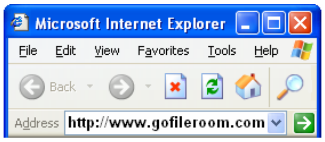
Figure 1.2

Exercise

a) Click on the ☒ in the upper right corner to close Internet Explorer,

b) Double click the icon.

c) Go to: **https://www.gofileroom.com**
(Fig 1.3)



Address http://www.gofileroom.com

Figure 1.3

Section 2

System Requirements

GoFileRoom requires the following components to be installed or enabled. Use the Check Browser feature to test your PC. *(Fig 2.1)*

Notes

✓ Internet Explorer version 6.0 or higher

✓ Adobe Flash Player version 7.0 or higher

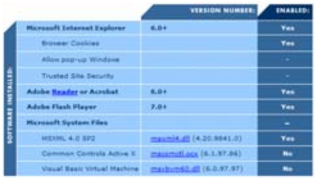
✓ Cookies MUST be enabled

✓ Microsoft XML version 4.0

✓ Adobe Acrobat 6.0 or higher (required for PDF markup)

✓ Mscomctl.ocx

✓ Msvbvm60.dll



	VERSION NUMBER:	ENABLED:
Microsoft Internet Explorer	6.0+	Yes
Browser Cookies		Yes
Allow pop-up Windows		-
Trusted Site Security		-
Adobe Reader or Acrobat	6.0+	Yes
Adobe Flash Player	7.0+	Yes
Microsoft System Files		-
MSXML 4.0 SP2	msxml4.dll (4.20.9841.0)	Yes
Common Controls Active X	mscomctl.ocx (6.1.97.86)	No
Visual Basic Virtual Machine	msvbvm60.dll (6.0.97.97)	No

Figure 2.1

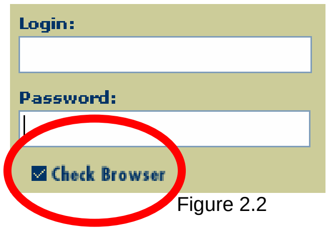
Important to know…

- If *Flash Player*, *XML, Mscomctl.ocx or Msvbvm60.dll* are not installed, you will be prompted to install these programs automatically when you go to the *Check Browser* information page.
- If your *Cookies* are not enabled, or your system does not meet the minimum requirements, please see your *System Administrator.*

Exercise

a) Click *Check Browser*. (Fig 2.2)

b) Verify that the correct software and versions are installed, and that Cookies are enabled. (Fig 2.1)



Login:

Password:

☑ Check Browser

Figure 2.2

Section 3

Login

GoFileRoom is a web-based document management system that is password protected for security purposes. To begin using GoFileRoom, you must login.

Notes

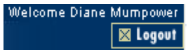
✓ Your password will be provided by the trainer or your system administrator.

✓ Your password can be reset if you forget it.

Security features:
"Secure" site (https)
Login/ Password protected
"Auto" logout after 3 hours

Important to know…

- Unless otherwise instructed by your trainer or system administrator, your initial password MUST be changed after your first login to GoFileRoom.
- Passwords are case sensitive.
- Passwords must be alphanumeric (requires at least one number and one letter), and must be at least 8 characters long.
- You are required to change your GoFileRoom password every 90 days.
- New passwords must not match any of the previous 10 passwords.
- After 3 invalid login attempts, your account will be disabled. If this happens, contact your GoFileRoom Administrator to enable your account.
- Passwords should not be shared.
- Once logged in, your name will appear near the Logout button.



Welcome Diane Mumpower
☒ Logout

Exercise

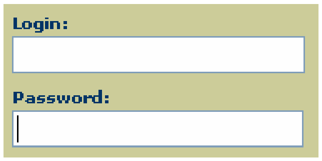


Figure 3.1

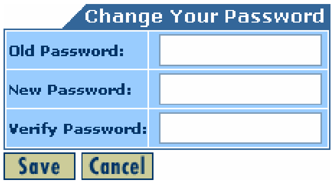


Figure 3.2

a) Enter your complete email address in the *Login* field, for example, johndoe@domain.com. (Fig 3.1)

b) Enter your *Password.*

c) The *Change Your Password* box will automatically appear. Enter your initial password in the *Old Password* field. (Fig 3.2)

d) Enter a *New Password.*

e) Enter your new password again to verify it.

c) Click the Save button.

Section 4

On Line Help

GoFileRoom's extensive Online Help system includes detailed information for the end-user. Topics are organized in the Table of Contents. (Fig 4.1) *Keyword Searching is also available.*

Notes

Topics Include:

✓ What's New Articles

✓ System Requirements

✓ Quick Reference Guides

✓ GoFileRoom Topics

✓ ScanFlow Topics

✓ GoFielRoom Administration

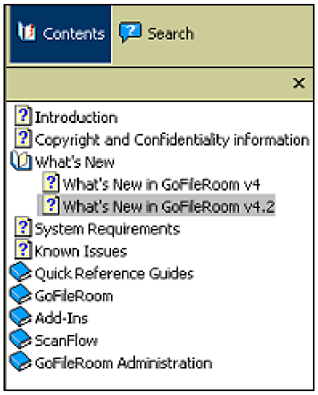

Contents
Search
×
Introduction
Copyright and Confidentiality information
What's New
What's New in GoFileRoom v4
What's New in GoFileRoom v4.2
System Requirements
Known Issues
Quick Reference Guides
GoFileRoom
Add-Ins
ScanFlow
GoFileRoom Administration

Figure 4.1

Important to know…

- This *Training Guide* is not intended to be a printed version of the *User Manual,* but rather a guide to be used in conjunction with the training class as key topics are reviewed.

- The Online *Help* system is your complete "How To" resource and electronic *User Manual*.

- When a new version of GoFileRoom has been released, the *Help* button on the File Cabinet page will flash red. Click the button, and the *Help* system will open with articles that describes the new features.

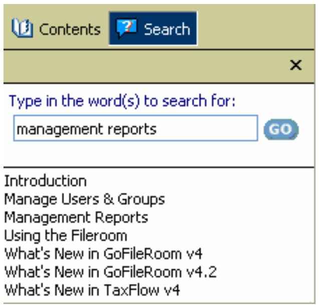
Exercise

a) Click the Help button on the Fileroom page.

b) Review the *Contents* list.

c) Click the *Search* link and enter "*management reports*" in the search box. (Fig 4.2)

d) Click any topic in the search results to display the article.



Type in the word(s) to search for:
management reports

Introduction
Manage Users & Groups
Management Reports
Using the Fileroom
What's New in GoFileRoom v4
What's New in GoFileRoom v4.2
What's New in TaxFlow v4

Figure 4.2

Section 5

Notes

The GoFileRoom File Cabinet

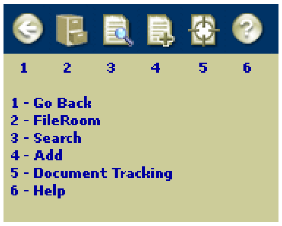
GoFileRoom is a "virtual" File Cabinet which includes various File Drawers. These Drawers are a repository for your documents with a common idea. For example: Cost Reporting documents could be filed in the DMAS Drawer.

Important to know…

- Depending on your responsibilities, you may have restricted access to the parts of the File Cabinet. (Fig 5.1)
- The page that displays the *File Cabinet* and drawer is referred to as the *FileRoom* page.
- To open a drawer, place your cursor over it.
- To close a drawer, move your cursor away from the file cabinet. If the drawer menus are not accessed, the drawers will close automatically after a few seconds.

Figure 5.1

- Navigation links to *Go Back*, *Search*, *Add*, *Tracking*, and *Help* are located underneath the GoFileRoom logo. (Figure 5.2)



1 - Go Back
2 - FileRoom
3 - Search
4 - Add
5 - Document Tracking
6 - Help

Figure 5.2

- To access the Fileroom cabinet drawer menus, simply place your cursor over the drawer you want to open and the menu selections appear. (Fig 5.3)

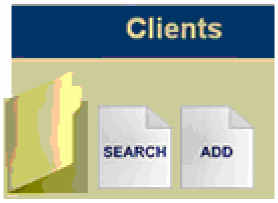


Figure 5.3

- A navigation toolbar appears on most GoFileRoom pages. This toolbar provides access to the major areas of GoFileRoom. (Fig 5.2)
- On the FileRoom Page, lower right hand corner you will see the Change My Password, Reports and Add in Section. (Fig 5.4)

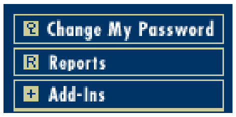


Figure 5.4

Note: For Providers and CPA Firms, you will need to download the Adobe Acrobat Add in for you to have full functions described in this book, and to be able to read all adobe documents filed.

Module 2 – Adding Documents

What you will learn in this module:

- **How to index documents for easy retrieval**
- **How to add electronic documents to GoFileRoom**

Section 1

Indexing Documents in GoFileRoom

Notes

There are several methods of adding documents to GoFileRoom. All methods include entering specific information about the document(s) being added to GoFileRoom in order to index them. This action of indexing documents is very detailed so that retrieving documents is quick and efficient.

Important to know…

- Documents filed in *GoFileRoom* do not have file names; instead they have a set of index values that you specify to create a "document profile". These indexes provide an easy, yet powerful, method of searching for documents stored in GoFileRoom.

- Some of the index fields provide *Lists* to help you enter the correct information. For example: the *DMAS* drawer contains a list of *Facility Names* and *Provider Numbers* which is retrieved from the DMAS database.

- Other index fields are sub-categories of a previous index, providing greater flexibility for adding and searching for documents. For example: the *DMAS* drawer contains a *File Section* index, and a *Document Type* index. For each *File Section* value*,* there is a specific list of *Document Types*.

- The index fields include a *Fiscal Period End Date* field. The date can be manually typed in or it can be selected from our calendar tool.

- The values you enter in the index fields will be deleted after you add a document if the checkboxes next to the document are not selected. If you are adding multiple documents to GoFileRoom with similar indexing, click the **Recall Index** button and change values as necessary.

- Each index field has a checkbox next to it referred to as *Sticky Fields.* These *Sticky Fields* will automatically be selected when using the *Recall Button* and will retain the last values entered when adding documents to GoFileRoom.

🕮 Exercise – Indexing Documents

a) Point to the *Drawer* to which you want to add documents; for example, DMAS-CG. (Fig 1.1)

Figure 1.1

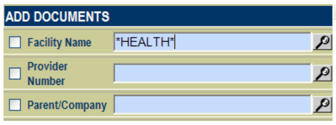
b) Click the Add button.

c) Enter the complete *Facility Name* and *Provider Number* in the index fields.

Option 1: **Lookup the Facility Name**

- Enter as much of the *Facility Name* as you know, and include a *wildcard* **(*)** before, after, or both.

  Example: **brown, brown*, *brown**. (Fig 1.2)



ADD DOCUMENTS

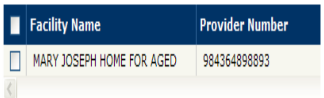
☐ Facility Name	*HEALTH* 🔍
☐ Provider Number	🔍
☐ Parent/Company	🔍

Figure 1.2

- Click the 🔍 button.

Option 2: **Lookup the Provider Number**

- Enter as much of the *Provider Number* as you know, and include a *wildcard* **(*)** before, after, or both. Example*: *123, 123*, *123*.*



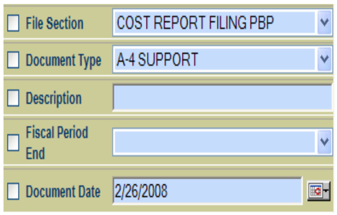
☐	Facility Name	Provider Number
☐	MARY JOSEPH HOME FOR AGED	984364898893

Figure 1.3

- Click the 🔍 button.

d) Click anywhere in the appropriate row in the *lookup table* to select the desired record. (Fig 1.3)

e) Select the *File Section* for the document. (Fig 1.4)



☐ File Section	COST REPORT FILING PBP
☐ Document Type	A-4 SUPPORT
☐ Description	
☐ Fiscal Period End	
☐ Document Date	2/26/2008

Figure 1.4

f) Select the *Document Type* (for the *File Section* you've chosen).

Note: The choices in the *Document Types* drop-down list are specific to the *File Section* that was previously selected.

g) Enter a *Description.*

h) Select the *Fiscal Period End*.

i) The *Document Date defaults to today and is Read Only.*

Section 2

Adding Electronic Documents to GoFileRoom

There are several methods of adding electronic documents to GoFileRoom. You have the choice to add documents right from the GoFileRoom website or with the direct integration features on your computer without even being in GoFileRoom!

Notes

Important to know…

- When you add electronic documents to the *virtual fileroom,* the document will remain in its original format. For example, if you add a Word document to GoFileRoom, it will remain a Word document.

- When you add electronic documents to GoFileRoom, the document is not deleted from the original location.

- You will be able to add Word, Excel and PDF documents directly from your computer or network to GoFileRoom. Check with your System Administrator to make sure you have the necessary software installed.

Exercise – Adding documents from GoFileRoom

a) Enter the index information for the electronic document on the *ADD* page. (Follow steps c-j in Section 1).

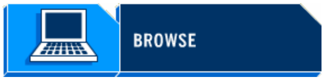


Figure 3.1

b) Click the *Browse* button. (Fig 3.1)

c) In the *Upload Document* window, click the Browse.. button to search/ locate a document on your computer or network. (Fig 3.2)

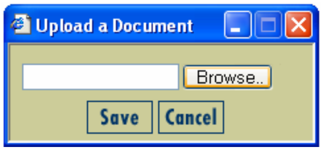


Figure 3.2

d) After you have selected a file, click the Save button to upload it into GoFileRoom.

Exercise – Send to GoFileRoom

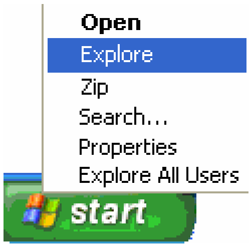


Figure 3.6

a) Right-click the Windows start button and select *Explore* in the pop-up menu. (Fig 3.6)

b) As instructed by your trainer, locate a document to add to GoFileRoom on your hard drive or a network drive.

c) Right-click the document file name, and select *Send To* in the drop down menu.

d) Click *GoFileRoom*. (Fig 3.7)

e) Enter the index information for the document.

f) Click the Save button to upload it to GoFileRoom.

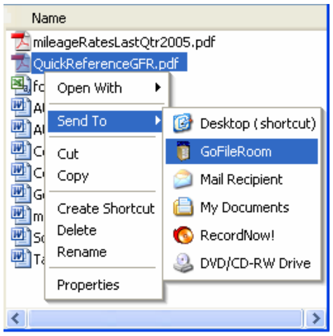


Figure 3.7

Exercise – Drag/Drop into GoFileRoom

a) Locate the *Send To GoFileRoom* icon GFR on your desktop along with a document that you want to add to GoFileRoom. (Do not open the document.)

b) Click the document icon and drag the document right on top of the *Send To GoFileRoom* icon. (Fig 3.8)

c) Enter the index information for the document in the index window.

d) Click the Save button.

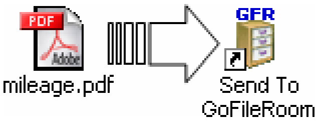


Figure 3.8

🕮 Exercise – Adding PDF documents

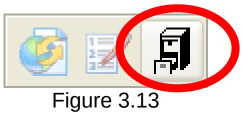


Figure 3.13

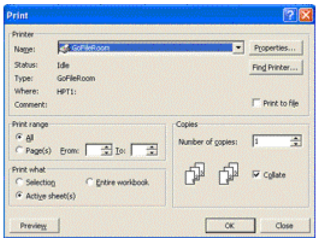
a) Open a PDF document on your hard drive or network to add to GoFileRoom.

b) Click the *Save To GoFileRoom* button on the toolbar. (Fig 3.13)

c) Enter the index information for the document.

d) Click the Save button.

🕮 Exercise – Print to GoFileRoom



Print

Printer
Name: GoFileRoom
Status: Idle
Type: GoFileRoom
Where: HPT1:
Comment:
☐ Print to file

Print range
● All
○ Page(s) From: To:

Print what
○ Selection ○ Entire workbook
● Active sheet(s)

Copies
Number of copies: 1
☑ Collate

Figure 3.14

a) Open the document regardless of type.

b) Select the File>Print command from the application's Standard Toolbar.

c) In the Print dialog box, select the "GoFileRoom" option and click "OK". (Fig 3.14)

d) Enter the index information for the document in the index window.

e) Click the Save button.

Module 3 – Searching Documents

What you will learn in this module:

- **Search for documents with easy to use features**
- **Search for documents by text or phrases in the content**
- **Save your most common searches**

Section 1

Searching in GoFileRoom

GoFileRoom's powerful SEARCH capabilities allow you to retrieve your documents with ease and efficiency. GoFileRoom's multi-searching capability can minimize or eliminate the problem of documents that have been misfiled or checked out..

Notes

✓ The *Search* page resembles the *Add* page, making it easy to learn and use. It has the same index fields as the *Add* page, but none of them are mandatory.

✓ Document searching can be based on any single criteria such as *Facility Name* or *Number*, *Document Type*, *Date*, etc., as well as any combination of these.

✓ Searching for documents can also be based on content, such as key words or phrases. Text searching is even more powerful when used in conjunction with one or more index fields to get very specific results.

✓ The document list matching your search criteria is pre-sorted by default, but can be sorted in ascending or descending order by any column heading.

✓ Document search results may be exported to Excel by clicking on the X icon.

Important to know…

- Documents can be searched for by using a wildcard (*) in the *Facility Name* or *Number* index fields or by selecting a specific *Client* from the *Lookup List*.

- When *SARAH* is typed in the *Facility Name* field, there are two choices:
  - Click the 🔍 button to select a specific *Client* with 'Sarah' in the name from the *Lookup List.*
  - Click the Search button to get a list of documents for clients that have "Sarah" somewhere in the Facility Name.

- More search criteria will give fewer, but more precise results (focused searching). Less search criteria will give more results (broader searching).

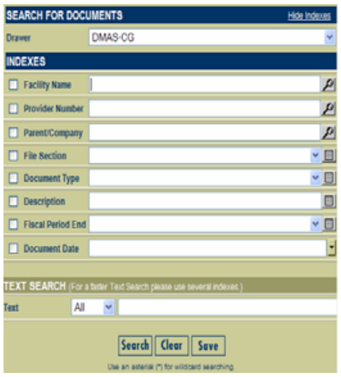
- The number of search results per page can be increased by selecting 20, 50, or 150 in the Documents Number list on a search results page. This is useful when deleting or re-indexing documents in bulk.

- GoFileRoom hitlists (document search results, document tracking, and other search results) are displayed in spreadsheet style, and include indexing, file, and status information.

- To view a list of all clients who have documents in GoFileRoom, enter a wildcard (*) in the *Facility Name* or *Number* field on the *Search* page and click the button. Only a client with documents will appear in this *Lookup List.*

Note: To view your entire client list, go to the *Add* page *Lookup List*.

Exercise – Search with Wildcards (*) & Lookup Lists



Drawer: DMAS-CG

Text: All

Figure 1.1

a) Navigate to the *SEARCH* page

Option 1: **From the FileRoom page**

- Click the *Drawer* from which to search for documents, for example, *DMAS*.
- Click the button.

Option 2: **From inside GoFileRoom**

- Click the icon in the upper left corner.

b) Enter as much of the *Facility Name* with a wildcard (*). For example. *Virginia*. (Fig 1.1)

c) Click the **Search** button under the index fields.

Result: Search returns documents for all clients with 'Virginia' somewhere in the name.

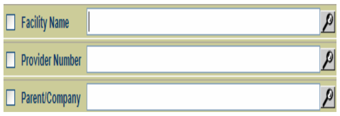


Figure 1.2

d) Toggle back to the *Search* page by clicking the go back icon. This displays both search results and search criteria.

e) Again, using the wildcard, enter as much of the *Facility Name* (or *Provider Number*). Click the button to select the complete *Facility Name* and *Provider Number* from the *Lookup List.* (Fig 1.2)

f) Click the **Search** button.

Results: Search returns documents belonging only to the 'Virginia' facility that was selected.

Important to know…

- More search criteria will give you fewer, but more precise results (focused searching). Less search criteria will give you more results (broader searching).
- Any combination of index fields may be used when searching.

Exercise – Search using Multiple Indexes

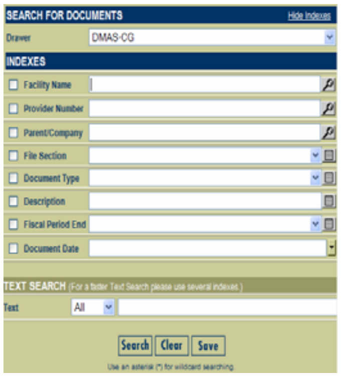
a) Enter a complete *Facility Name* and *Number* using the wildcard and *Lookup List.*

b) Select a *File Section.*

c) Select a *Document Type.*

d) Select a *Year.* (Fig 1.3)

e) Click the Search button.



Drawer: DMAS-CG

Text: All

Figure 1.3

Exercise – Multi value Searching

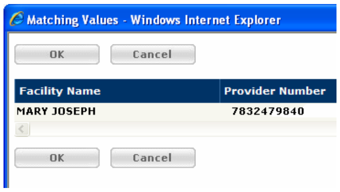
Option 1: **Multiple Clients**

a) Enter a wildcard (*) in the *Facility Name* or *Provider Number* field and click on the 🔍 button.

b) Select multiple clients by checking the boxes on the left of the *Lookup List* and click the OK button. (Fig 1.4)

c) Click the Search button.

Result: Search returns all documents for the selected facilities.



Facility Name	Provider Number
MARY JOSEPH	7832479840

Figure 1.4

Option 2: **Multiple Indexes**

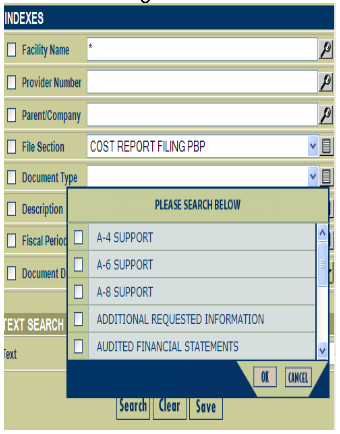
a) Select a *File Section*.

b) Click the ▤ button next to the *Document Type*

c) To select more than one value, check the boxes on the left (for example, A-4 Support and A-6 Support) and click the OK button. (Fig 1.5)

d) Click the Search button.

Result: Search returns all A-4 and A-6 Support Documents.



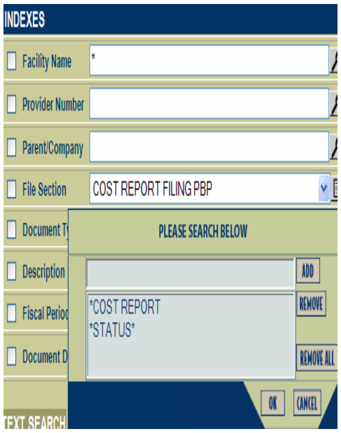
☐ Facility Name: *

☐ File Section: COST REPORT FILING PBP

☐ A-4 SUPPORT
☐ A-6 SUPPORT
☐ A-8 SUPPORT
☐ ADDITIONAL REQUESTED INFORMATION
☐ AUDITED FINANCIAL STATEMENTS

Figure 1.5

Option 3: **Multiple Descriptions**



Facility Name: *
File Section: COST REPORT FILING PBP
*COST REPORT
STATUS

Figure 1.6

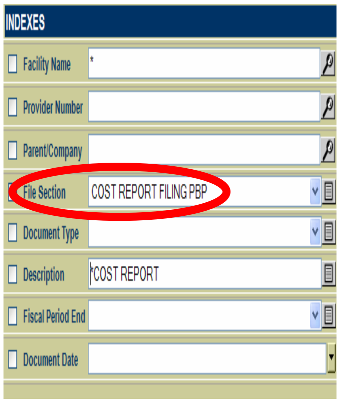
a) Click on the ▤ button next to the *Description* field

b) Enter a key word of the description text with a wildcard (*) before, after or both, for example, *signed*, and click the ADD button. Repeat with additional key words as necessary, and click the OK button (Fig 1.6)

c) Click the Search button.

Result: Search returns all documents that have the key words in the *Description* index entered in the multi-value window.

🕮 Exercise – Search using the Description



Facility Name: *
File Section: COST REPORT FILING PBP
Description: *COST REPORT

Figure 1.7

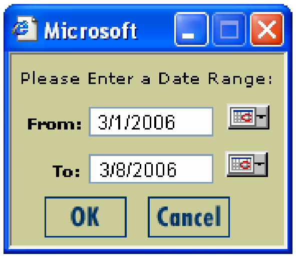
a) Enter as much of the *Description* text as you know in the *Description* field with a wildcard (*) before, after or both.

b) For example, *cost report* (Fig 1.7)

c) Click the Search button

Result: Search returns all documents with the text *cost report* anywhere in the description.

🕮 Exercise – Search using Date Range



Please Enter a Date Range:
From: 3/1/2006
To: 3/8/2006

Figure 1.8

a) Click the ▾ button on the right side of the *Date* field.

b) Enter a range of dates (m/d/yyyy) in the *From* and *To* fields. (Fig 1.8)

Note: Also available is to select a date with the calendar 📅 icon. If left empty the field will default to the current date for the *To* field and to 1/1/1950 for the *from* field.

c) Click the *OK* button.

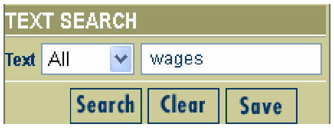
d) Click the Search button.

Result: Search results will include all documents with a date value on or between the specified date range.

Important to know…

- GoFileRoom allows a search for a document based on key words or phrases within the actual document.
- As documents are uploaded to GoFileRoom, they go through an Optical Character Recognition (OCR) process, which makes them fully *Text Searchable*. This process may take up to 24 hours.
- The *Text Search* feature does not allow for use of wildcards.
- To use the *Text Search* feature, at least one index value must be entered.

Exercise – Full Text Searching



Text: All — wages

Figure 1.9

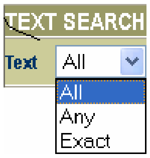


Figure 1.10

a) Enter at least one index value; for example, Facility Name = *Virginia*.

Note: The use of a wildcard (*) in the *Facility Name* or *Number* field may be the one index value, however, *Text Searching* will be faster if actual values are entered.

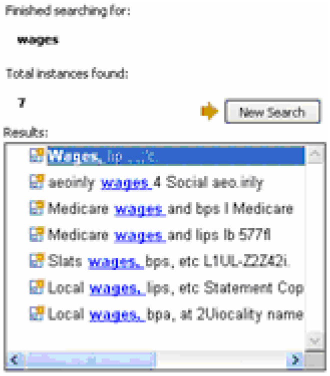
b) Enter one or more keywords in the *Text Search*; for example, wages. (Fig 1.9)

Note: If you enter more than one keyword for your *Text Search*, select the appropriate search type from the drop-down menu (*All*, *Any*, or *Exact*). (Fig 1.10)

c) Click the Search button.

Result: Search returns all documents that have the word 'wages' within them.

Note: If a PDF found in the search results is opened, a summary list of all findings of the search text within that PDF is also displayed. Click any of the links in the list, and the corresponding page on which the text was found will open. The search text will be highlighted on the PDF page. Click the next link to go to the next page the text is found, and so on. (Fig 1.11)



Finished searching for:
wages
Total instances found:
7
Results:
Wages, lp ...'c.
aeoinly wages 4 Social aeo.inly
Medicare wages and bps I Medicare
Medicare wages and lips lb 577fl
Slats wages, bps, etc L1UL-Z2Z42i.
Local wages, lips, etc Statement Cop
Local wages, bpa, at 2Uiocality name

Figure 1.11

Important to know…

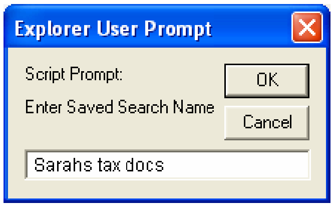
- Up to ten commonly used personal searches may be saved for quick document retrieval.
- A default search is provided that will display the last 10 documents viewed.

Exercise – Saving a Search

a. Enter search criteria that you want to save in the index fields and/or the *Text* field.

b. Click the Save button under the index fields.

c. Enter a *Saved Search Name* and click the OK button. (Fig 1.12)



Sarahs tax docs

Figure 1.12

d. To search for documents using the *Saved Search* feature, select an option from the *Saved Search* drop-down menu. (Fig 1.13)

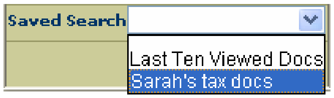


Figure 1.13

Result: The *Saved Search* feature will provide a list of documents that match the criteria used for the saved search.

Module 4 – Working with Docs

What you will learn in this module:

- **How to use the Document Hitlist page**
- **How to work with documents**

Section 1

Document Hitlist Page

A successful search in GoFileRoom will display a list of documents matching your search criteria, which referred to as the Document Hitlist. Adding documents is a fundamental part of GoFileRoom because it is your "virtual file cabinet" for filing electronic documents. The results you get from searching for documents are just as important because working with files is necessary in your day to day job responsibilities.

Notes

🗁 Important to know…

- Specific search criterion (no wildcard) is summarized at the top of the *Hitlist.*
- Every document in the *Hitlist* can be selected for performing different functions, such as *Copy* and more.
- Every document in the *Hitlist* will have an icon that indicates the type of document it is, such as PDF, Excel, and Word. (,X, W)
- The icon representing the type of document will be animated (a pen moving back and forth) when a document is being edited, or has been checked out of the file cabinet. This lets other users know that it is available for viewing only. The user's name, who is editing the document, will be displayed in the *Checked Out* column.
- The documents on the *Hitlist* appear in a default order, but can be sorted in ascending or descending order by clicking on any column header.
- A page of search results can include 20, 50, or 150 documents.
- Navigating between pages is easy with the "*Next*" and "*Previous*" links found above your search results. You may also type in the page number directly.
- The document *Hitlist* may be exported to Excel by clicking on the X icon, which is located by the navigation links.
- Each document in the *Hitlist* is viewable in a separate Internet Explorer window simply by clicking anywhere on the document row.

Section 2

Working with Documents

In the previous sections, adding and searching for documents was covered. This section helps you learn how to work with documents in GoFileRoom such as editing, copying, merging (PDF), and more.

Important to know…

- Two or more PDF documents in the *Hitlist* can be merged together in the order you choose.
- Users may view documents from the *Hitlist*:
  - ✓ Click on the document row to open it in the GoFileRoom viewer (read-only).
- Documents that are opened for editing are checked out by the user during which time others will only be able to view it.
- Documents that are opened in the GoFileRoom viewer are not checked out.
- In the document *Hitlist*, one or more documents of any type can be copied, re-indexed, deleted (with system permissions).

Exercise – Copy Documents

a) From the *Document Hitlist*, select the checkbox next to the document you want to copy.

b) Right-click and select *Copy Documents* from the drop-down menu. (Fig 2.13)

c) In the *Copy Documents* window, enter the index values for the new document. <u>ONLY</u> enter the index values for the new document that are different from the selected document.

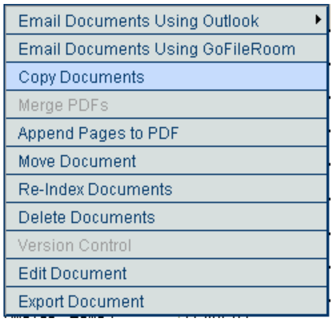


Figure 2.13

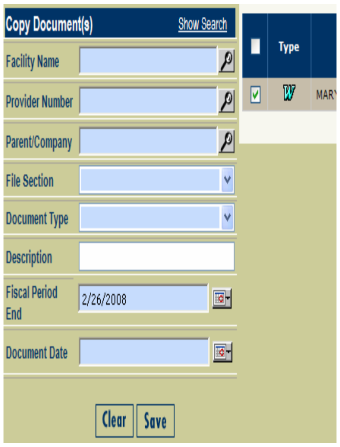
For example, to copy a document from a previous Fiscal Period End to the current FPE for the same *Provider*, *File Section*, *Document Type*, etc., enter the index value for the new *FPE* <u>only</u> (Fig 2.14)

Original Indexes (from selected document):

Facility Name: Sarah Squires
File Section: General Correspondence
Document Type: Outgoing
Description: Reminder
Period End: 12/31
Fiscal Year End: **2/26/20007**
Document Date: blank

New Indexes (for copied document):

Facility Name: blank
File Section: blank
Document Type: blank
Description: blank
Period End: blank
Fiscal Year End: **2/26/20008**
Document Date: blank



Fiscal Period End: 2/26/2008

Figure 2.14

d) Click the **Save** button.

Result: The new copied document will be stored in Sarah Squires' file with all the same indexes as the original document but with the new year.

Note: If multiple documents selected on the *Hitlist* to be copied have different *Provider Numbers*, *File Sections*, and/or *Document Types*, enter in all the new index values in the blue fields.

Exercise – Export Documents

a) From the *Document Hitlist*, select the checkbox next to the document that you want to export from GoFileRoom onto your computer.

b) Right-click and select *Export Documents* from the drop-down menu. (Fig 2.21)

c) Click the Save button in the *File Download* window to export a copy of the GoFileRoom document onto your computer. (Fig 2.23)

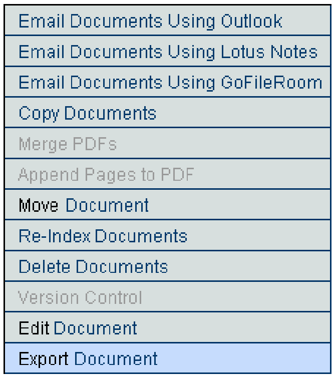


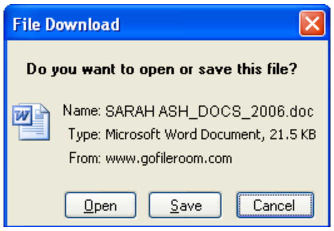
Figure 2.21

Notes: Documents can be exported from GoFileRoom one at a time. To export more than one document at a time, utilize the Copy to Laptop feature. (See search section on how to do this.)

The original document stays in GoFileRoom.

All copy to laptop (GoFileRoom Offline) actions, or other export functions, are audited in the document's history, and will appear on the document tracking.

Tip: Exercise caution with documents that have been exported. We recommend exporting documents for reviewing offline, or reference purposes only.



Do you want to open or save this file?

Name: SARAH ASH_DOCS_2006.doc
Type: Microsoft Word Document, 21.5 KB
From: www.gofileroom.com

Figure 2.23

Exercise – Show Document History

Note: Firm policy determines archive permissions and procedures.

a) From the *Document Hitlist*, select the checkbox next to the document you want to see the audit history on.

b) Right-click and select *Show Document History* from the drop-down menu. (Fig 2.24)

c) The Document Audit Report box will display (Fig 2.26).

Note: The Document Audit Report may only be viewed for one document at a time. The report provides all filing, document viewing, editing and index modification histories for the selected document.

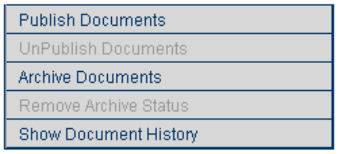
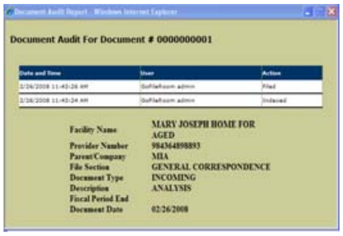


Figure 2.24



Document Audit For Document # 000000001

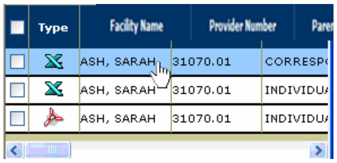
Date and Time	User	Action
2/26/2008 11:43:26 AM	GoFileRoom admin	Filed
2/26/2008 11:43:24 AM	GoFileRoom admin	Indexed

Facility Name MARY JOSEPH HOME FOR AGED
Provider Number 984364898893
Parent/Company MIA
File Section GENERAL CORRESPONDENCE
Document Type INCOMING
Description ANALYSIS
Fiscal Period End
Document Date 02/26/2008

Figure 2.26

Exercise – Working With the GoFileRoom Viewer

a) From the *Document Hitlist*, click anywhere on a document row to open it into GoFileRoom viewer mode. (Fig 2.27)



☐	Type	Facility Name	Provider Number	Pare
☐		ASH, SARAH	31070.01	CORRESP
☐		ASH, SARAH	31070.01	INDIVIDU
☐		ASH, SARAH	31070.01	INDIVIDU

Figure 2.27

Note: Documents opened in GoFileRoom viewer are "read-only" and not "checked out". Adobe Annotations can be performed in this mode by all viewers, even simultaneously!

b) If presented with a *File Download* window, click the Open button.

c) With the viewer open (Fig 2.28), many of the same functions as in the right-click menu covered in the previous section are available. The additional features are indicated with an Add'l sign below.

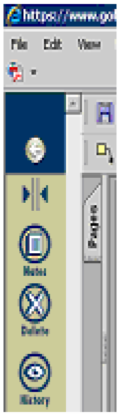
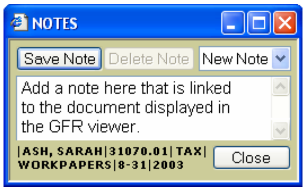


Figure 2.28

	Opens up a view so that the full index values can be seen, and also allows for re-indexing to occur.
Add'l Notes	Allows for a note to be added to any document in read- only mode. (fig 2.29) This includes Word, excel etc. This will be yellow with a red circle when notes have been saved to a document.
Delete	Deletes the document from GoFileRoom. This is a permission based function and will only show if allowed by login identification.
History	Request to Show Document History, a complete audit history of the document.



Add a note here that is linked to the document displayed in the GFR viewer.

|ASH, SARAH|31070.01|TAX|WORKPAPERS|8-31|2003

Figure 2.29

Module 5 – Appendix

What you will learn in this module

- **Information on the Document Tracking Report**

Section 1

Document Tracking Report

Allows for an overview of all documents added into the system. The who, when and how of the documents stored in GoFileRoom.

Important to know

Notes

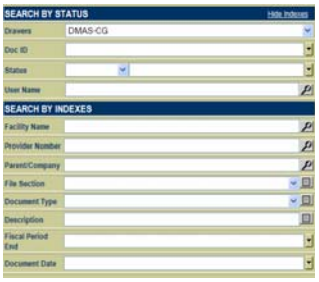
- The Document Tracking Report can be accessed through the Icon in the navigation toolbar.
- The report tracks document status as well as who added the document, how, and when. Administrators are capable of viewing all documents. Users will only see their own documents, if they have permission.

Exercise – Report Generation

a) Select the appropriate drawer by using the “Drawers” drop-down menu. (Fig 3.1)

b) Enter values in one or more fields or search indexes to retrieve the list of desired documents. (Fig 3.1)

c) Click on the “Search” button. This will return a list of documents based on the search criteria. This is your Document Tracking Report. (Fig 3.2)



Drawers: DMAS-CG

Figure 3.1

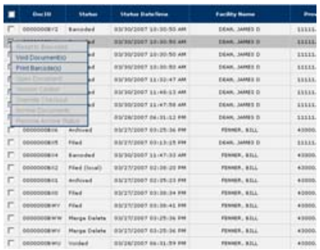
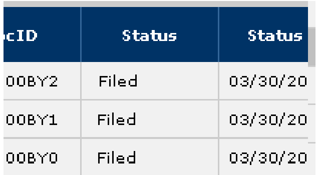


Figure 3.2



cID	Status	Status
00BY2	Filed	03/30/20
00BY1	Filed	03/30/20
00BY0	Filed	03/30/20

Figure 3.3

The value in the Status column is the last phase the document has reached during the import process. There are several possible statuses. (Fig 3.3) See table below :

Status	Description
Indexed	Indexed and corresponding ID was generated.
Doc ID	Indexed and corresponding ID was generated..
Filed	Successfully filed document.
Voided	Barcode or Document ID has been voided and can not be reused.
Deleted Doc	Deleted document that was once filed.
Checked Out	Word, Excel or PDF documents that are currently checked out for editing by users. If necessary, an override of this setting can occur.

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