Table of Contents

Introduction  1

Features  2

FileBound Dashboards  2
Forms Designer  4
Forms Portal  5
Indexing Queue Layout  6
Combine and Split Documents  7
Indexing Queue Viewer  8
Indexing Quality Control  9
Grid Updates and Menu Layouts  10
Web Viewer Menus  11
Workflow  12
Secure Stencil, Checklist and/or Message on Connection, Multivote Options  13
Duplicate File Check  14
Lock/Unlock Documents on Workflow Steps  14
Validation Stencil  15
Workflow Stamp Action  16
FIFO and LIFO Setting for Multi-Queue Steps  17
Lock Document Property Accessible to Workflow Terms  17
Pause on Decision  18
Drag to scroll  19
Undo/Redo in Workflow Process Designer  20
PowerShell Support for Workflow  20
Required Divider and Separator  21
Default Divider and Separator  21
Mobile Apps and Browser Support  22
Add to Clipboard from Assignments  23
Maintaining Break Pages in Folder Import  23
Current Date Support for Dividers and Separators  23

FileBound 7 Edition Comparison  25

FileBound 7 Server and Hardware Requirements  27

Frequently Asked Questions  34
Introduction

With a fresh experience and enhanced features, FileBound delivers greater efficiency by automating the flow of work in the enterprise.

The first thing you'll notice about FileBound 7 is that it offers a distinctly unique, engaging experience over other enterprise applications. We've taken the time to mature the user experience throughout our product to create more efficiencies for the user and to offer them an interface that will get them excited about FileBound and the task at hand.

This update was an important one for FileBound; it allowed us to take a second look at the usability and scalability of our application and ask the question, “How do we make this easier and more efficient for our users?” Our goal is to deliver a consistent and intuitive user interface (UI), focused on ease of use, faster navigation, reducing clutter and bringing focus to the relevant and most important content.

Efficiency

All of our improvements revolve around efficiency. The features highlighted in this document – editable grids, expandable columns, intuitive dashboards and reporting, and additional steps to enhance quality control, just to name a few – along with previously introduced features like automation services, personalized workspace, advanced workflow and mobile accessibility gives users the tools they need to do the right work and do the work right.

Since a big part of increasing efficiency is in reducing learning curves, you'll find that, although each section of our site has been redesigned and visually enhanced, we've kept the same general layout and structure to reduce the learning curve for our current users. From there, we made process improvements that have increased our processing and loading speeds and continued by enhancing our workflow processing to handle high volumes of data.

Navigation

The top navigation has been streamlined to reduce clutter and confusion. The top right menu is strictly user-focused: User Information, Password, Preferences, Saved Searches and Logout. FileBound Central Administration has been moved to the bottom left corner of the page and is now represented by a gear icon.

We kept the site navigation consistent, but updated the look of our section icons and added a secondary navigation panel that takes the clutter from the primary menu section and orders it into a collapsible menu, giving the user more space to focus on the most important content.

Section Menus

We've learned that sometimes icons can be confusing – especially if the intended action can't easily be expressed in a 15x15 image. So, we removed the icon-based menus from within the sectional areas (Search, Clipboard, Assignments, etc.) and replaced them with text that the user can quickly and easily find the actions they need.

FileBound has always been focused on the user experience and our latest release does not disappoint. From a new interface to a suite of power-packed features, this document will highlight the changes we've made to FileBound 7, show the features available in the different product offerings, list server and hardware requirements, and answer some of your most common questions.
**FileBound Dashboards**

FileBound Dashboards provide users a visual representation of how their system is being used and the expected performance of their processes. Our dashboards provide administrators charts and graphs of important information about who is using the system, what they are doing, and how they are doing it.

In addition to this information, FileBound also provides meaningful, actionable, and timely reports called Insights that, based on historical data, predicts the movement of information through their FileBound system.

These insights are used to provide visibility into the processing of individual items or a whole process against historic averages.
Use Case:
A controller for a manufacturing company needs information about invoices that are currently in an approval process. They are able to use a dashboard to see how many invoices are at a given step within the process. The controller is then able to look at the total value of invoices and receive information on when those invoices will complete the approval process based on past performance. The controller is able to see the total amount that will be due to a specific vendor. Using this information the controller is able to adjust any payment schedules to take advantage of discounts or avoid missing due dates.
**Forms Designer**

FileBound's Forms Designer puts the power of creating forms in the hands of the users, with easy drag and drop design capability.

In addition to desktop forms, the Forms Designer allows the user to responsively design forms that will resize to best display the form on the viewing device. The designer also has templates that can be used to jumpstart the building process. These forms can be used within FileBound or the Forms Portal.

**Use Case:**
An HR manager needs to provide an online job application. Traditionally, they would have had to request assistance from an HTML developer, but using the Forms Designer, they can now build a form and post it for online submission in a matter of minutes, without any assistance.

Drag and Drop
Add elements to the form by dragging them from the toolbox and dropping them onto the page.
**Forms Portal**

The Forms Portal eliminates the complexity of hosting forms. It allows customers to grant public access to forms. Access to forms can also be secured using login credentials or special access codes. When the form is complete, the information is securely stored in FileBound and immediately accessible in any workflow process.

**Use Case:**
An insurance company has been using FileBound to store rate quote requests and now wants to make the request an online form. A “Request Quote” link has been added to the insurance company website that takes the user to the Quote Request form hosted on the FileBound Portal. When the form is completed the information is added directly into FileBound and routed for review. The insurance agent is able to create the form quickly and easily using the Forms Designer.

**Form Security**
Forms can be created, edited and stored in FileBound and can be completed and submitted by users who do not have access to FileBound or who have been provided a one-time access code.
Indexing Queue Layout

The indexing queue has a fresh, new look and a number of high caliber new features. All document information and thumbnails of each page within the document are displayed in the right panel. Users can drag and drop thumbnails onto each other to combine or separate .tif documents.

Indexing Menu
The options on the left allow the user to apply and view filters for their queue. The right menu lets the user Index, Delete or change the status of their documents.

Quality Control
Documents awaiting quality control review will be displayed in this tab. Authorized users can view, edit and approve pending documents.

Document Information
Document-specific information, including indexing errors for the highlighted document is displayed in this panel.

Page Thumbnails
The right panel displays the page count of the document and thumbnails of each page.
**Combine and Split Documents**

Save users time and frustration by giving them the ability to alter the documents without having to reupload or rescan them. FileBound’s drag-and-drop feature allows users to combine or separate .tiff documents.

**Use Case:**
Occasionally, documents are scanned or uploaded into the indexing queue incorrectly. This feature allows users split or combine pages to address any such issues.

---

**Spliting Documents**

Drag thumbnails from the right panel over to the main queue. Dragging the thumbnail to an open space creates a new document, while dragging the thumbnail over another document will add that page to the document. The tooltip below the document signals the user that they are creating a new document or adding to an existing document.

---

**Combining Documents**

Click and drag thumbnails to the right panel to add pages to the end of the selected document. Pages can be rearranged in the Indexing Queue Viewer.
Indexing Queue Viewer

A popular request from our users is the ability to reorder pages in the Indexing Queue Viewer. In addition to this feature, the added white space and clean design removes clutter and allows the user to focus on the task at hand.

Use Case:
In the attempt to compile hard copies of multi-page documents, it is often the case that the pages are scanned or uploaded into FileBound in the wrong order. Users can now reorder the pages in the thumbnail view within the Indexing Queue Viewer.

Page Reordering

Using the thumbnail section, users can drag the thumbnails to reorder their pages, which saves them from having to rescan the images or documents and is particularly helpful after combining several documents together.
Indexing Quality Control

This new feature allows administrators to set-up a quality control queue for verification of documents that have been indexed manually or automatically. This feature ensures accurate indexing prior to submission into FileBound.

Use Case:
Manual data-entry and automated templating are prone to errors. These errors can cause downstream productivity loss due to incorrectly indexed documents or workflow decisions based on incorrect data. FileBound's Quality Control queue gives users a chance to review and verify document information prior to submission into FileBound.

Project Selection
This dropdown is a quick way for users to navigate through the indexed documents of various projects.

Drag and Drop Columns
The dragable and expandable columns allow the user to personalize the layout of their page.

Editable Grids
Our editable grid gives users the option to make changes to the information without ever opening the document. And, specifically for keyboard-focused users, we've included the use of keyboard controls to quickly navigate across the grid and make necessary changes.
**Grid Updates and Menu Layouts**

Optimized search layouts allow users to work more efficiently. The personalized grids allow the user to arrange the columns in an order that is most effective for them. Editable grids allow the user to edit values in an Excel-like format. And, specifically for keyboard-focused users, we’ve included the use of keyboard controls to quickly navigate across the grid. The streamlined menus help users focus on the task and related data while still giving them access to much needed functionality.

**Personalized Columns**

Drag to rearrange the columns in any preferred order.

**Editable Grids**

Excel-like edits within the results grid allow users to make changes on the fly; users are not required to open the File Details page or the Viewer to make these changes.

**File-Specific and Section Menus**

The green file-specific menus appear when a file is selected. The text-based menus allow the user to quickly and easily find the actions they need. Buttons are used to signal important actions.
**Web Viewer Menus**

The web viewer has a fresh, clean look. We've utilized the white space and streamlined the top bar by combining like-actions into menus. The bottom menu gives users the ability to horizontally stack multiple tabs. This structure reduces confusion and better optimizes the viewing experience.

**Menu Groups**

We've logically grouped the icon-based actions into menu groups: Send, Add, Search, Download, Miscellaneous. Action can be taken on documents or files are selected in the file tree.

**Web Viewer Tools**

Users can rotate and zoom into the document via this tool bar. Additionally, Web Viewer settings can be configured using the gear icon at the right.

**Tab Stacking**

Users can horizontally stack multiple tabs, allowing them to access the information they need, when they need it.
Workflow

Automate even the most complex processes with a graphical, user-friendly configuration tool, enabling quick deployment. Workflow processes can be as simple as a couple of standard user assignments or as complex as advanced decision logic, multiple linked processes, look-ups and automatic escalations.

Flexible Assignments
Assign workflow steps to individual users, groups, queues, or voting groups.

Automatic Decisioning
Make decisions on processing flows, loop through items, or selectively assign items using Flow Control stencils.

Systematic Actions
Perform systematic actions like updating values, generating forms, sending email notifications or securing documents using Action stencils.

Workflow Step Details
The Workflow Designer displays key information about the selected stencil in the Details pane at the bottom of designer window.
Secure Stencil, Checklist and/or Message on Connection, Multi-Vote Options

Checklist and Messages on Connection
After clicking a workflow task button a user can be presented with a checklist or message that is unique and specific to that button.

Additional Options for Multi-Vote
The buttons that are presented to a user of a Multi-Vote step type can have the labels of the buttons changed from “Yes” and “No” to any two desired values.

Secure Stencil
A workflow action stencil can apply a digital signature of a selected user to a document or lock/unlock a document for a specific user.
**Duplicate File Check**

In a workflow process you can check to see if a duplicate file exists. This eliminates the duplication of processing and maintains the integrity of your repository.

**Use Case:**
When processing invoices, a workflow process needs to determine if an invoice has already been added to the system based on the Invoice Number and Vendor Name to prevent duplicative processing and payment.

![Duplicate Configuration](image)

**Lock/Unlock Documents on Workflow Steps**

A document in workflow can be automatically locked to the assigned user, preventing other users from modifying the document. When a document is locked, users attempting to access the document are notified that the document is being processed by the assigned user.

**Use Case:**
A college application review process uses a multi-queue step type for the initial form review. When a user pulls an item from the queue it will automatically lock the document. This prevents other users from changing the document while it is in the review step. When the step is completed, the lock is automatically removed.

![Locking and Unlocking a Document](image)
Validation Stencil

Within a workflow process, a user is able to evaluate documents, or combination of documents, that are present in a file.

Use Case:
An employee file must contain a predefined set of documents. In an Employee On-Boarding process, a validation step can be configured to determine that all of the necessary documents are present in the file. If not, the routed document can be sent down a path of resolution. If the documents are present, the document can continue to the next step in the workflow process.

Confirming Documents
The workflow validation stencil evaluates the presence of dividers and separators and the number of documents in each.
**Workflow Stamp Action**

Stamps can be automatically applied by a workflow process without user intervention.

**Use Case:**
An invoice that has completed an approval workflow can be automatically stamped with a “Paid” stamp when the workflow process is completed. When the document is viewed, the paid stamp will be on the document and provide a visual indicator that the document has been paid.

**Setting the Stamp**
A workflow action stencil applies an annotation stamp to a routed document. The stamp can be user-specific or a global server stamp.

**Stamp Location**
The location and size of the stamp is configured in the stencil, placing the stamp in the same location every time.
**FIFO and LIFO Setting for Multi-Queue Steps**

Allows workflow queue steps to be configured for the newest items or the oldest items to be processed first. In previous versions, the Multi-Queue step functioned as a first in, first out configuration that only allowed the oldest items to be processed first.

**Use Case:**
In an information request workflow process, it is critical for the forms to be processed in the order in which they were received. Using a FIFO queue step, the workflow can be configured to process the oldest information request, first.

---

**Selecting FIFO or LIFO**

Multi-Queue steps can be designated as “First In, First Out” (FIFO) or “Last In, First Out” (LIFO), allowing the oldest items or newest items in a queue to be processed.

---

**Lock Document Property Accessible to Workflow Terms**

Workflow processes can use the information about the user who locked a document to make decisions or update information. The process can be configured to make decisions, send email messages or update index fields using this information. This prevents duplicative processing and offers notification regarding locked documents.

**Use Case:**
In a contract approval workflow the first step in the workflow can determine if a user has the contract locked. If it is locked, it can be placed in a holding queue until the document is unlocked.
**Pause on Decision**

When in simulation mode, users are able to see what values the decision stencil is using to evaluate the decision and determine the connections the document will be sent to.

**Use Case:**
When developing a workflow a user may experience an issue where the document is not taking the expected connection. Within the simulator, the user is able to stop the document on the decision stencil and see the values being evaluated to make the decision.

---

**Pause Buttons**

Users are able to stop a document on a decision stencil to see the values that are being returned and evaluated.

**Workflow Step Details**

The Details pane at the bottom of designer window displays key information about the selected stencil.
Drag to scroll

The user does not need to have the entire process in view to be able to move stencils or connections; they are able to navigate to the area they need simply by dragging the element they are trying to place.

Use Case:
A large workflow process can take more real estate than is viewable on the screen. When a user needs to move a connection from a stencil to a portion of the screen outside the viewing area, they can do so by clicking and dragging that connection.

As the cursor reaches the bottom of the viewable area of the diagram, the diagram starts to scroll down to display more of the process. When the desired connection is in view, the user is able to release the hold and attach the connection to the new stencil.
**Undo/Redo in Workflow Process Designer**

When designing workflow processes, the undo/redo action help reduce time and frustration.

**Use Case:**
When creating a workflow process, a user may want to align several stencils in a horizontal row. The user selects all of the desired stencils and accidently aligns all the stencils vertically which stacks them on top of each other. The user is able to click the “Undo” button to reset the stencils back to their original location.

**PowerShell Support for Workflow**

Workflow developers can leverage the Scripting term to access PowerShell or VBScript. PowerShell provides the flexibility not available in VBScript.

**Use Case:**
Invoice approval workflows can have complex calculations that match invoice amounts, quantities and totals. In these scenarios, PowerShell can be used to perform these complex custom calculations.
This functionality can be implemented for both separators and dividers.

Required Divider and Separator

When a “Required” divider or separator is not present in a file, the respective divider or separator will be displayed and highlighted red.

The user now has a visual cue for required dividers or separators within a file. This feature can also be used to identify missing documents in a file.

Divider Use Case:
Employee files are stored in FileBound. When the Human Resources Director is viewing an employee file, the highlighted divider provides a visual indicator of a missing, required employee document.

Separator Use Case:
A manufacturing plant is storing sign-off documents in FileBound for each product manufactured. There are three departments that have various sign-off documents. Each department is identified at the separator level.

If a department has not added any sign-off documents, that department’s name will appear in red indicating a missing document.

This functionality can be implemented for both separators and dividers.

Default Divider and Separator

A commonly used divider or separator can be configured as defaults for a project, eliminating the need for manual entry.

Divider Use Case:
Purchase Requisitions are stored within FileBound and are added to the system using the Indexing Queue. When the user is scanning the documents, they do not have to take the time to select a divider. They will automatically go into the “Request” divider that has been set as the default.

Separator Use Case:
Contracts are stored within FileBound and are added to the system using the Indexing Queue. When the user is scanning the documents, they do not have to take the time to select a separator. They will automatically go into the “Contract” separator that has been set as the default.

Separators or dividers can be marked as “Required” when configured by an administrator.

Separators or dividers can be marked as “Default” when configured by an administrator.
Mobile Apps and Browser Support

FileBound Touch is an interface designed specifically for the mobile user. Users can access FileBound Touch via any mobile browser, giving them access to FileBound with a swipe of a finger. Additionally, FileBound provides mobile apps for the two largest mobile OSs in the world - Android and iOS. Our apps give tablet and phone users access to their FileBound Touch sites anywhere, at any time.

FileBound Touch is supported on:

- iOS 6 and greater
- Android 4.1, 4.2, and 4.3, with limited upload support for 4.4

Use Case:
A CFO is out of the country when a large purchase contract is received. Waiting for him to return would delay the closing of this contract. Using FileBound Touch from his Android phone or his iPad, the executive can review and approve documents from anywhere and at any time.
**Add to Clipboard from Assignments**

Allowing users to save their assignments to their clipboard helps them to tag tasks which require immediate attention. Users can quickly return to these documents without having to search for a particular item amongst their entire assignment list.

**Maintaining Break Pages in Folder Import**

The pages with break conditions can be imported into FileBound without being automatically discarded.

**Use Case:**
A document has been created so that it contains a barcode value of “00F00” to indicate a new file break. This barcode has been added at the bottom of page. The import process can now maintain this page, instead of automatically discarding it as a barcode page.

**Current Date Support for Dividers and Separators**

The system will automatically use the current date for the divider or separator name eliminating manual entry. This will populate the current date into the divider or separator name when a document is first added to it.

**Use Case:**
A project is used to store contracts which can contain multiple types of contracts. The contracts are separated by the date they are added to the system. The system will automatically set the date as the separator or divider name.
FileBound 7 Edition Comparison
## Edition Comparison Chart

<table>
<thead>
<tr>
<th>Features</th>
<th>Document Management (DM)</th>
<th>Workflow (WF)</th>
<th>Enterprise (EN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Management</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Document Capture</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Flexible Configuration (Defined Fields)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Document Library Services (Revisions, Document Locking)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Document Notation (Annotations, Signatures, Stamps)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Granular Security</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Web-Based Viewing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PDF Forms</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>HTML Forms</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Global Search</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Online Indexing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mobile Application (iOS &amp; Android)</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Advanced Workflow Processing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Flexible Workflow Designer</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Validation</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Automated Escalations</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Import</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Email Import</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Social Media Import</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Classification &amp; Indexing</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Scheduled Workflow Execution</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Scheduled Report Delivery</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Responsive Web Forms</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Responsive Web Form Designer</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Forms Portal</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Analytic Dashboards (Cloud Only)</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
FileBound 7 Requirements
Client and Server Hardware Recommendations
FileBound 7 Client Hardware Recommendations

Minimum PC Requirements to Operate FileBound 7 (Not Server Requirements)

Supported Operating Systems:
• All Windows Vista Systems
• Windows 7 (32 bit and 64 bit)
• Windows 8 (32 bit and 64 bit)
• Windows 8.1 (32 bit and 64 bit)

Supported Internet Browsers:
• Internet Explorer 9.x, 10.x and 11.x
  • Internet Explorer 10 or greater is recommended.
• FireFox 18.x and greater
• Chrome 28.x and greater
• Safari (WebViewer Only on a Mac)

Processor:
• Minimum - 1 Ghz
• Recommended - 2 Ghz

RAM:
• Minimum - 2 GB
• Recommended - 3 GB

Other Requirements:
• Microsoft .NET Framework 4.5

Minimum Mobile Requirements for FileBound Touch

Supported Mobile Operating Systems:
• iOS 6 and greater
• Android 4.1, 4.2, 4.3, 4.4
  • Upload support for Android 4.4 is limited.
FileBound 7 Server Recommendations

The FileBound application is developed for implementations of all sizes, from small implementations that operate on a single server to large enterprise implementations on multi-server, multi-tier farms. The FileBound application supports scalable infrastructures that utilize industry standard practices and paradigms for horizontal, vertical and diagonal (combination of vertical and horizontal) scaling. Such standard practices include load-balancing, clustering and N-tier architecture.

Enterprise Installation

An enterprise installation consists of a load-balanced web farm (one or many physical servers and one or many virtual web servers), a load-balanced application server farm (one or many physical servers and one or many virtual web servers), a clustered database server, direct attached or network attached document storage and direct attached or network attached database storage.

A highly-available enterprise installation would utilize fault-tolerant architecture, such as active-passive load-balancing, web and application pools and clustered database and storage servers.

Load Balancer

Industry leading load-balancing equipment such as f5 Networks BigIP local or global traffic manager (LTM or GTM).

Web Servers

Physical web servers virtualized using VMWare ESX technology or Microsoft Hyper-V technology.

Application Servers

Physical web servers virtualized using VMWare ESX or Microsoft Hyper-V technology. **Note: Application Servers are not required for FileBound installations. They are illustrated for security considerations**

Database Servers

Clustered physical servers using 64bit server OS and 64bit SQL Server, fiber-channel connected to fast SAN storage.

Document Storage

Physical servers providing low-latency, high IOPs NAS/SAN storage in a RAID 6 configuration.

Database Storage

Physical servers providing low-latency, high IOPs (RAID 10) SAN storage, fiber-channel connected to database servers.
Minimum Server Recommendations for FileBound Installations

When setting up a FileBound installation there are many variables that must be considered when determining the proper hardware. FileBound is a scalable solution that can grow as the needs grow. This scalability can allow FileBound to fit into solutions of different sizes by merely adjusting the hardware that is used to host FileBound. For these reasons, there are no set “Requirements” for servers that are running FileBound, only server “Recommendations”. FileBound is a web application comprised of Internet Information Services (IIS), SQL Database and File Servers. Mircosoft's requirements for servers running these components will determine the minimum requirements. Below is the information to determine the server recommendations for a FileBound system.

FileBound Installation Levels

Below are installation levels based on the expected usage of FileBound:

**SMALL - Installations**
- S1 - Less than 1 Million documents and/or 5 Concurrent Users
- S2 - Less than 5 Million documents and/or 15 Concurrent Users

**MEDIUM - Installations**
- M1 - Less than 1 Million documents and/or 25 Concurrent Users
- M2 - Less than 5 Million documents and/or 50 Concurrent Users
- M3 - Less than 10 Million documents and/or 100 Concurrent Users

**LARGE - Installations**
- L1 - Less than 1 Million documents and/or 100 Concurrent Users
- L2 - More than 1 Million documents and/or 200+ Concurrent Users
- L3 - More than 5 Million documents and/or 200+ Concurrent Users

*Note: If utilizing workflow, double the number of expected concurrent users to accurately estimate the installation level.*

FileBound Server Classifications

Below are Classification levels based on the servers that can be utilized by FileBound:

<table>
<thead>
<tr>
<th>Class</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Dual-Processor Xeon, 64bit, .NET Framework 4.5</td>
</tr>
<tr>
<td>C2</td>
<td>Dual-Processor, Dual-Core Xeon, 64-bit, .NET Framework 4.5</td>
</tr>
<tr>
<td>C3</td>
<td>Dual Processor, Dual or Quad Core Xeon, 64bit, .NET Framework 4.5</td>
</tr>
</tbody>
</table>

Concurrent User Licensed Installations

A single web server and up to 50 concurrent users are allowed with a concurrent license. For more than one web server or more than 50 concurrent users, please contact your FileBound Representative.
**FileBound Server Operating System Recommendations**

It is recommended that all servers run a minimum of the 64bit version of Windows Server® 2008 or later.

<table>
<thead>
<tr>
<th>Windows Server® 2008</th>
<th>Windows Server® 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Windows Server 2008 Standard Edition</strong> supports up to 32 GB of RAM. This makes it sufficient for a basic FileBound web server and storage server at the same.</td>
<td><strong>Windows Server 2012 Standard Edition</strong> supports up to 4TB of RAM. This makes it sufficient for a basic FileBound web server and storage server at the same.</td>
</tr>
<tr>
<td><strong>Windows Server 2008 Enterprise Edition</strong> supports up to 2 TB of RAM and virtually unlimited network connections. Using this operating system on a server gives you the ability to upgrade memory as needed.</td>
<td><strong>Windows Server 2012 Enterprise Edition</strong> is not a version that is offered with Windows server 2012.</td>
</tr>
<tr>
<td><strong>Windows Server 2008 Datacenter Edition</strong> supports up to 2 TB of RAM. Using this operating system flexibility to virtualization and scalability.</td>
<td><strong>Windows Server 2012 Datacenter Edition</strong> supports up to 4 TB of RAM. Using this operating system flexibility to virtualization and scalability.</td>
</tr>
<tr>
<td><em>FileBound 7.x is supported on 64bit operating systems only</em></td>
<td><em>FileBound 7.x is supported on 64bit operating systems only</em></td>
</tr>
</tbody>
</table>

Large FileBound installations can utilize more than one web server. The amount of concurrent users expected on the FileBound system will determine the number of web servers deployed in the server environment. Under nominal load, a single web server can serve content for about 50 simultaneous user sessions before experiencing significant performance degradation. User sessions include sessions initiated by Importer and Capture utilities. Typical recommended web servers are single processor, multi-core machines running 64bit Microsoft 2008/2012 Server and configured with a minimum 8GB installed RAM for 64bit systems. The use of virtualization substantially increases the number of web servers available per unit of physical hardware.

A load-balancing solution can be implemented to share the load across the servers and create a fault-tolerant, highly available web system. This can be done with DNS, URL redirection or through the use of a hardware appliance. Microsoft offers a free software-based balancer with Windows called Microsoft Network Load Balancing. This software adds additional load on the web servers but is a reliable load balancer. The Microsoft NLB solution is fairly easy to install and configure and can be installed to existing servers. A hardware based load balancer is recommended for increased performance and fault tolerance. FileBound On-Demand utilizes f5 LTMs for a hardware load-balancing solution.

More information regarding load balancing and load-balancing techniques can be found at the following web sites:
http://www.f5.com

**Important Note:** When operating FileBound in a load-balanced environment, the server affinity must be configured so that a user continues to use the server they first logged into, for the duration of their session. Subsequent sessions can be redirected to another server as desired by the load balancing methodology.
### Microsoft SQL Server® Recommendations

<table>
<thead>
<tr>
<th>Recommended</th>
<th>Supported SQL Server Versions</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server 2008 64bit SP3</td>
<td>SQL Server 2008 64bit</td>
<td>SQL Server 2008 64bit SP3</td>
</tr>
<tr>
<td>Windows Server 2008 R2 64bit</td>
<td>SQL Server 2012 64bit</td>
<td>Windows Server 2008 64bit</td>
</tr>
<tr>
<td>16 GB Memory</td>
<td></td>
<td>8 GB Memory</td>
</tr>
<tr>
<td>Named Instance Recommended for FileBound</td>
<td></td>
<td>FileBound should be the only database using resources</td>
</tr>
<tr>
<td>Data files (.mdf) and Log Files (.ldf) stored on separate drives</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Recommended memory for 64bit systems is 16 GB. Typically 4 GB is reserved for the operating system, and the remainder for SQL Server. For recommended installs set the minimum memory value to 8 GB for 64bit systems and maximum to server capacity.

Database backups should be performed daily and index maintenance should be done weekly.

More information regarding SQL Server configuration and best practices can be found at the following web site: http://technet.microsoft.com/en-us/library/cc966534.aspx

### Document Storage Server Considerations

Special consideration should be used when planning storage for large FileBound installations utilizing more than one web server. The document storage path is stored in the FileBound database and therefore is the same path for all web servers. Each web server must have read/write access to this particular document storage location. The storage technology that meets these requirements completely is Network Attached Storage (NAS).

### FileBound Windows Enterprise Service Hardware Recommendations

A FileBound Windows Enterprise Service should not be hosted on the same hardware as the FileBound application or database server. An Enterprise Service should be installed on a separate workstation with the following minimum requirements.

If additional Enterprise Service processing is required, options include adding processing workstations or a virtualized server.

FileBound Windows Enterprise Service Minimum Requirements:
- 64bit Operating System
- Windows 7
- 4 GB RAM
- 250 GB Hard Drive
- i3 Processor
**What Configuration Type Will Be Used?**

Each Installation Level can have different configuration types. The different types take into consideration the number of servers that will be used to handle the three major components of FileBound: Web Server, Document Storage and SQL Database. For help in determining the components to be used see the matrix below.

**Type A** - Single Server for FileBound, SQL Database, and Document Storage

**Type B** - Two Servers, 1 - FileBound/Document Storage, 1 - SQL Database

**Type C** - Three Servers, 1 - FileBound, 1 - Document Storage, 1 - SQL Database

<table>
<thead>
<tr>
<th>TYPE</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>USE</td>
<td>All</td>
<td>Web/Doc</td>
<td>SQL</td>
</tr>
<tr>
<td>LEVEL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S1</td>
<td>Server Class: C1</td>
<td>Server Class: C1</td>
<td>Server Class: C1</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 8 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 100 GB</td>
<td>HD Space: 100 GB</td>
<td>HD Space: 72 GB</td>
</tr>
<tr>
<td>S2</td>
<td>Server Class: C1</td>
<td>Server Class: C1</td>
<td>Server Class: C1</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 8 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 500 GB</td>
<td>HD Space: 500 GB</td>
</tr>
<tr>
<td>M1</td>
<td>Server Class: C2</td>
<td>Server Class: C1</td>
<td>Server Class: C2</td>
</tr>
<tr>
<td></td>
<td>RAM: 8 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 8 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 500 GB</td>
<td>HD Space: 72 GB</td>
</tr>
<tr>
<td>M2</td>
<td>Server Class: C2</td>
<td>Server Class: C1</td>
<td>Server Class: C2</td>
</tr>
<tr>
<td></td>
<td>RAM: 16 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 8 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 500 GB</td>
<td>HD Space: 146 GB</td>
</tr>
<tr>
<td>M3</td>
<td>Server Class: C2</td>
<td>Server Class: C1</td>
<td>Server Class: C2</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 8 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 500 GB</td>
<td>HD Space: 300 GB</td>
</tr>
<tr>
<td>L1</td>
<td>Server Class: C2</td>
<td>Server Class: C2</td>
<td>Server Class: C2</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 16 GB</td>
<td>RAM: 4 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 146 GB</td>
<td>HD Space: 36 GB</td>
</tr>
<tr>
<td>L2</td>
<td>Server Class: C2</td>
<td>Server Class: C2</td>
<td>Server Class: C1</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 500 GB</td>
<td>HD Space: 146 GB</td>
<td>HD Space: 1 TB</td>
</tr>
<tr>
<td>L3</td>
<td>Server Class: C2</td>
<td>Server Class: C2</td>
<td>Server Class: C1</td>
</tr>
<tr>
<td></td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
<td>RAM: 4 GB</td>
</tr>
<tr>
<td></td>
<td>HD Space: 36 GB</td>
<td>HD Space: 36 GB</td>
<td>HD Space: 146 GB</td>
</tr>
</tbody>
</table>

*All specifications listed in matrix above are minimum recommendations*
Frequently Asked Questions
Forms Questions

1. Is the Forms Portal supported with FileBound Cloud only?
   A: No, the Forms Portal is also available for On-Premise systems. The link would be: http://sitename/portal.

2. Can I display forms directly from the Forms Portal using a URL link?
   A: Yes. You can use http://sitename/portal/forms/formname to display the form without forcing a user to select a form. Or, you can use http://sitename/portal/forms/formname&hidetop=true to display the form only and remove the top header.

3. Can I edit a 3rd party created HTML form in the Web Form Designer?
   A: No, the Web Form Designer only supports forms built using the Web Form Designer.

4. Do I need to update current forms that were built in previous versions of FileBound to support these new form classifications such as Submission and View/Edit?
   A: No, there are no changes needed to current forms. These forms will be available within the new Structured Forms area.

5. Does the Forms Portal and Forms Menu allow the ability to display forms built in previous versions of FileBound or Structured forms?
   A: Yes, as long as the form is a HTML or PDF e-form and is set as a Submission form type within Central Administration.

6. Will my customer get the Forms Portal and Web Form Designer with their site when upgrading to FileBound 7?
   A: The Forms Portal and Web Form Designer are available to FileBound Enterprise customers.

Technical Questions

7. What versions of supporting applications will work with FileBound 7?
   A: Importer Pro 7.0 or newer, Integration Kit 7.0 or newer, FileBound Capture 6.05.000 or newer, Enterprise Service 4.0.

8. What Web Server OS version will support FileBound 7?
   A: 64bit OS only.

9. Does the Client station have to be a 64 bit OS?
   A: No, the client stations can be 32bit.

10. What version of .NET Framework is required for FileBound 7 and supporting applications?
    A: Microsoft .NET Framework 4.5.
11. Are there any installers for FileBound 7.0?
A: Yes, FileBound 7.0 can be installed using FileBound Central Installation located at:
http://install.filebound.com/

12. Can you upgrade directly from FileBound 4 or 5 to 7, or do you have to upgrade to FileBound 6 first?
A: Yes, you can upgrade directly from FileBound 4 or 5 to 7 without upgrading to FileBound 6 first.

13. Can I run the Central Administration utility from a Mac?
A: No.

14. Is Microsoft SQL Server 2005 supported?
A: No.

15. Is Microsoft SQL Server Express supported?
A: Yes.

16. Will my FileBound 6 custom plug-ins and events work with FileBound 7?
A: They should, however there could be the possibility that some may have to be rebuilt to work with
FileBound 7. It is highly recommended that you test all customizations and plugins in a production like
environment prior to upgrade.

17. Will my FileBound 6 branding work with 7?
A: Yes, FileBound 7 supports branding changes to the login page. Changing the logo within the application is
also supported. Color changes are not possible.

18. Is IE 8 supported with FileBound 7?
A: No, only IE 9 and greater are supported with FileBound 7

Experience Questions

19. Do you have an SSAE16 available to customers?
A: Yes, we can provide a click-through SSAE16 to customers. Please contact your FileBound representative for
more information.

20. Has the FileBound Touch interface also been redesigned?
A: No, the FileBound Touch interface has not changed.

21. Will FileBound Office Automation be offered with FileBound 7?
A: No. FileBound Office Automation will now be available in FileBound Enterprise. The same processes exist in
FileBound Enterprise that were in FileBound 6. FileBound Enterprise includes additional new features that
were not included with FileBound Office Automation. Please reference the FileBound comparison chart or
contact your account rep to review the new features available for FileBound Enterprise customers.
22. How extensively was FileBound 7 tested?
A: FileBound 7 went through multiple rounds of full testing. Each round executed over 16,000 test cases. Included in those test cases were cases created from all customer reported issues in FileBound 6.6.

23. Is there still a storage limit for the concurrent user model on the cloud?
A: All concurrent cloud subscription licenses have a 5GB per user limit. For example, a 5CC subscription license will have a storage limit for 25GB for the site.

24. Do all documents go to the QC step before uploading into FileBound?
A: There are a couple of options when sending docs to Quality Control. You have the ability to send any documents that are manually indexed to QC or not. The Auto-Index process allows documents to automatically enter Quality Control for verification before final commitment into a project. By default, the QC step is disabled.

**Workflow Questions**

25. Will my workflow processes need to be re-published after I upgrade?
A: No, they will not need to be republished.

26. Do I have to use the Secure Stencil to lock a document while it is assigned to a user?
A: No, when configuring the step you have the option to lock the document to that user while it is on that step.

27. Can I setup multiple conditions when configuring a validation?
A: Yes, the validation stencil allows you to configure unlimited conditions that need to be met for the validation to pass.

28. What document types are supported when using the Stamp stencil?
A: The stamp stencil supports .tif and .pdf file types.

29. When using the Loop stencil what is the expected number of items that can be processed before a customization will be needed?
A: Workflow processing has been optimized to handle hundreds of items with the loop stencil.

30. Am I able to have unique messages displayed based on the task buttons that a user presses within a workflow process?
A: Yes, each connection can have its own unique prompt that is displayed when a user presses a task button.
Dashboard Questions

31. Are Dashboard reports available on premised based systems?
   A: No, Dashboards are available only on the cloud

32. What licensing is required to have the Dashboard reports?
   A: FileBound Enterprise Cloud license

33. Can either a reseller or user create their own custom reports?
   A: No, custom reports can be accomplished by the FileBound Professional service team.

34. Is there additional security around Dashboard reports?
   A: Currently, if the user has access to reports, they can see all the dashboard reports

35. My client is currently on the cloud office Automation license, will they have Dashboards when they upgrade to FileBound 7?
   A: Yes.

36. Will my Cloud reseller site have dashboards?
   A: Yes.

37. Will publishing an updated workflow process affect my Insight reports?
   A: No, our drop-downs will have to be like workflow status where it shows all previously published routes too.

38. Are the Dashboards replacing the standard reports?
   A: No, they will not replace the standard reports, all licensing will still have the standard reports.