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# INTRODUCTION

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FileitSuite is a web-based document management solution. It simplifies your electronic filing system by using new Web 2.0/Ajax technology and is backed by Microsoft SQL server. FileitSuite is designed for fast filing and retrieval of documents. There are several ways to get a document into FileitSuite for processing and storage:

- Use FTP to upload files into the processing folder.
- Use the upload tool on FileitSuite to manually upload files, for example a file on your computer or network.
- Use the optional Scan Module to scan, from either a remote or local site.

As the administrator of FileitSuite, this User's Guide will take you step by step in setting up FileitSuite and tailoring it to your business's needs. Your role as administrator will be to set up the document groups, users, permissions, and maintenance of your FileitSuite application. You will also be able to view various reports regarding usage and maintenance.

As the user of FileitSuite, this User's Guide will explain the various features of FileitSuite and how to use these features in filing and retrieving documents for your business.

# GETTING STARTED

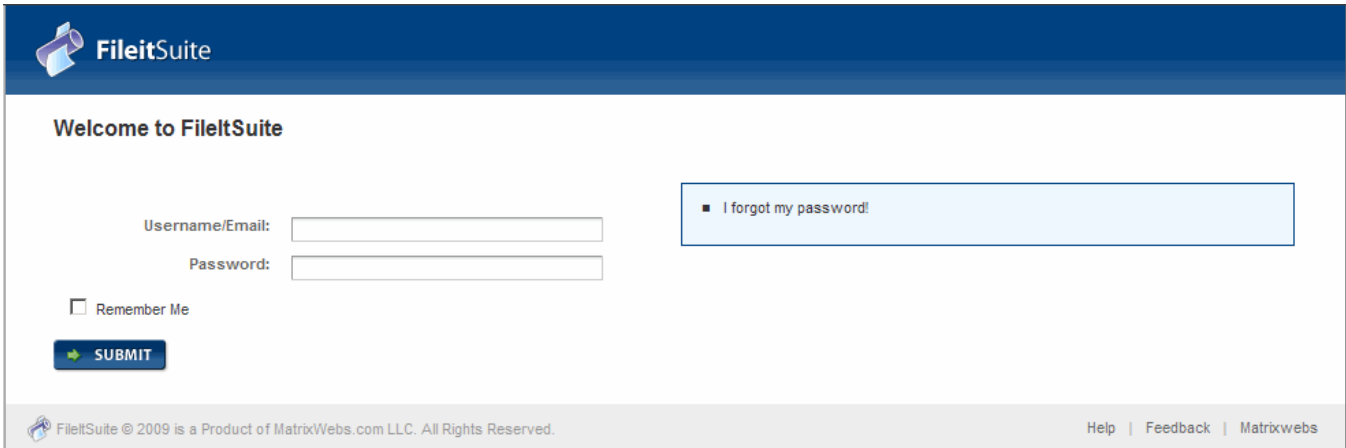
## Logging On and Off

To log on to FileitSuite, enter the following information:

**Username** – Your user name/e-mail should already be set up for you by your system administrator. This field is case-insensitive.

**Password** – Your password should also already be set up for you by your system administrator. This field is case-insensitive.

**Remember me** - This checkbox allows you to tell the system to remember your user name and password information. The next time you log on, a pull-down menu will appear as you type in your user name so that you can make a selection. Once you enter your user name, the password field will automatically be filled with the password entered for that user name.



Once you have entered your login information, click on the SUBMIT button or press “Enter” on your keyboard. If the information is incorrect, you will receive one or more of the following error messages:

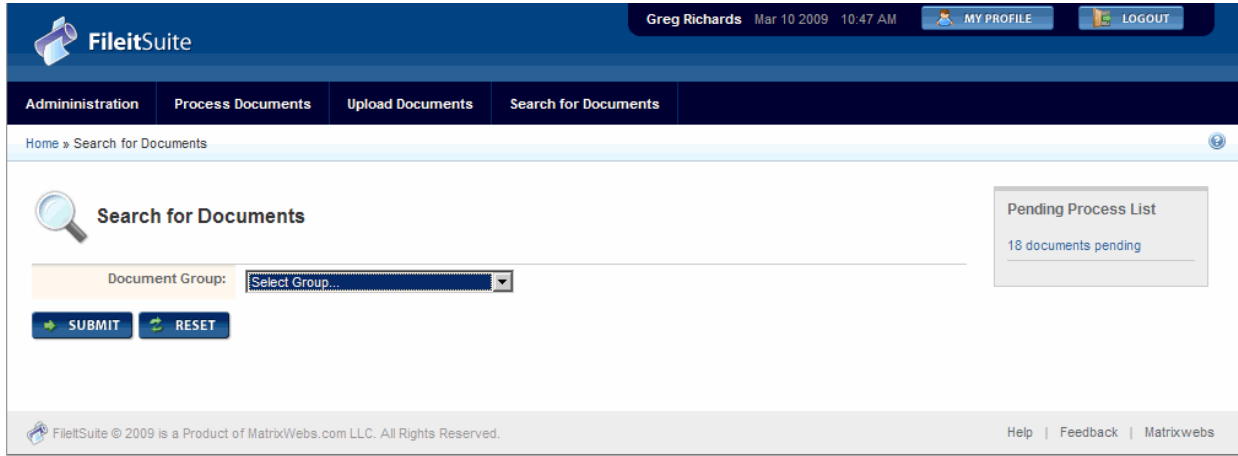
- UserName and/or password is incorrect.
- Auth Failed.

Re-enter your user name and/or password and click on the SUBMIT button again.

To log off of FileitSuite, simply click on the LOGOUT button that is displayed at the top right part of your FileitSuite window.

## Elements Displayed on All FileitSuite Pages

Once you have logged on to FileitSuite, you will see a page similar to the following:



This section discusses the items that are displayed on all FileitSuite web pages once you have successfully logged on.

### *User Bar*

The user bar is located at the top right part of the FileitSuite window.



#### **Name, Date, and Time**

Your first and last name, the current date, and the current time are displayed in the upper right part of the FileitSuite window.

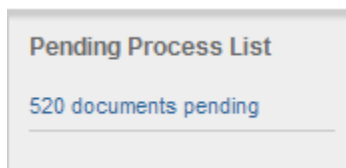
#### **MY PROFILE Button**

Click on this button to display a page that allows you to view and/or update your personal information.

#### **LOGOUT Button**

This button allows you to log out of FileitSuite at anytime.

### *Pending Process List*



This box shows the number of documents that have already been scanned into FileitSuite and are waiting to be processed. This means that the documents are waiting to be reviewed and stored in the FileitSuite database with specified information such as a date and a purchase order number. As documents are scanned into FileitSuite or processed, the “documents pending” count is automatically updated.

## Navigation Bar

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The navigation bar is the main menu selection bar which is always displayed, no matter what page within FileitSuite you are viewing. What menu selections you see depends on what access privileges you have. As Administrator, you have access to everything. The menu selection bar will look like the following:



**Administration**: If you have administrator privileges, you will be allowed to make selections from this menu in order to update and maintain the functionality of FileitSuite. If you do not have Administrator privileges, this menu selection will not be displayed.

**Process Documents**: If you have processing privileges, this menu selection will display a page from which you can select a document group, and the documents that have been scanned for that document group. These documents are waiting to be processed, in other words reviewed and stored, in FileitSuite. If you do not have processing privileges, this menu will not be displayed.

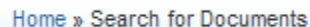
**Upload Documents**: If you have processing privileges, this menu selection will display a page from which you can select a document group and a document name to upload. The document you specify is one that is accessible from your computer as opposed to scanned into FileitSuite. If you do not have processing privileges, this menu will not be displayed.

**Search for Documents**: This menu selection will display a page from which you can specify certain parameters for the documents you wish to search for within the FileitSuite database. This is the default view when you successfully log on to FileitSuite.

## File Path

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The file path is displayed directly below the main menu selection bar. Each time you make a menu selection, the file path will be updated to display where you are within FileitSuite.



The image shows a light blue highlighted box containing the text "Home » Search for Documents".

For example, when you first log on to FileitSuite, the file path will say:  
Home >> Search for Documents

If you choose to process a document that is pending, the file path will be updated to display:  
Home>> Process Documents>>Process Document Details.

## Helpful Links

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Once logged on to FileitSuite, several links are provided for your convenience:

**FileitSuite Logo:** The FileitSuite logo at the top left corner of the FileitSuite window can be clicked on at any time to display the home page of FileitSuite.

**Help:** Click on this link to bring up another browser window that will display the FileitSuite Help Wiki. This area provides helpful resources and documentation regarding the FileitSuite application.

[Help](#) | [Feedback](#) | [Matrixwebs](#)

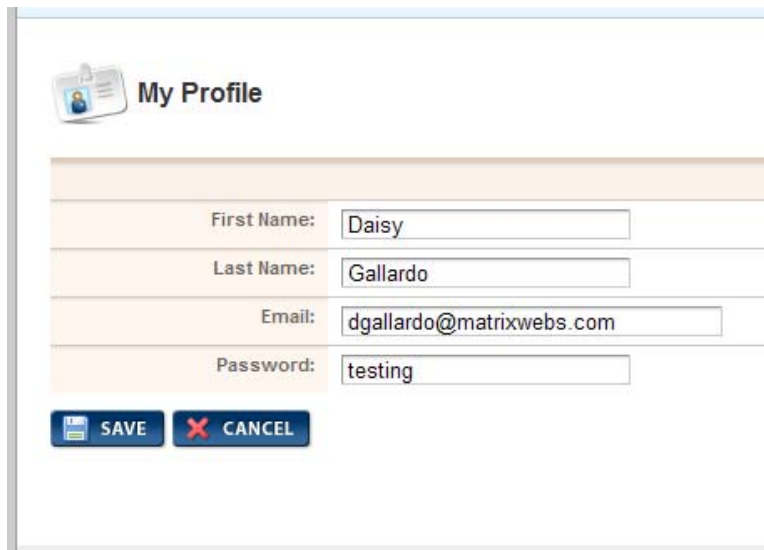
**Feedback:** If you have any feedback regarding the FileitSuite application – for example, features that you would like to see – click on this link and a screen will come up where you can e-mail us with your comments or suggestions.

**Matrixwebs :** Click on this link for more information on our company, Matrixwebs.

## Profile

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Your profile consists of your personal information, such as your name, e-mail address, and password. If you click on the MY PROFILE button on the top right part of the FileitSuite window, the following screen will appear:



**My Profile**

First Name:	<input type="text" value="Daisy"/>
Last Name:	<input type="text" value="Gallardo"/>
Email:	<input type="text" value="dgallardo@matrixwebs.com"/>
Password:	<input type="text" value="testing"/>

Each field is an editable text box that can be updated with information. Click on the SAVE button if you would like to save your changes and use the new information. Click on the CANCEL button if you no longer wish to make changes to your profile.

# ADMINISTRATION

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This section contains information for users that have administrator privileges. As administrator, you can define what document groups and users in those document groups can use FileitSuite; where on your server the documents get stored; what access privileges document groups and users have; and what information is required when scanning, processing, uploading, or searching for documents. You can also view various reports about the users and usage of FileitSuite.

As administrator, you can:

## **Setup Document Groups (folders on server):**

- Set permissions
- Set tags for each folder
- Set requirements
- Set masks over fields

## **Setup users and permissions for:**

- Administrators
- Document Processors
- Users

## **View various reports and statistics:**

- User stats
- Document views
- Storage space used

- Automatically create 600mb folders
- Allow data to be transferred onto CD

Mouse over the “Administration” menu selection from FileitSuite’s home page. A drop-down menu with the following selections will be displayed:

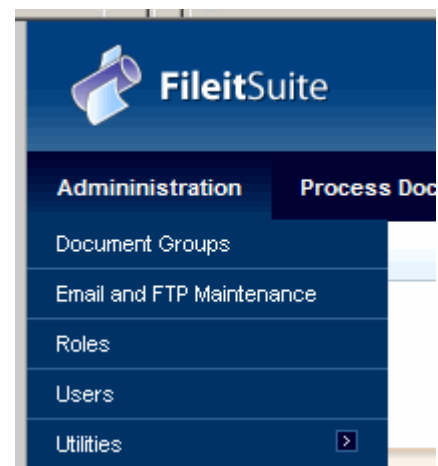
**Document Groups**: This menu selection allows you to define groups for which you want to file documents. Folders will be created on FileitSuite for that document group.

**Email and FTP Maintenance**: This menu selection allows you to define the e-mail and FTP parameters for FileitSuite.

**Roles**: This menu selection allows you to define roles for users that have access privileges to FileitSuite.

**Users**: This menu selection allows you to create users that will have access to FileitSuite.

**Utilities**: This menu selection will display a drop-down menu that allows you to view statistics on users and documents.



## Document Groups

### What is a Document Group?

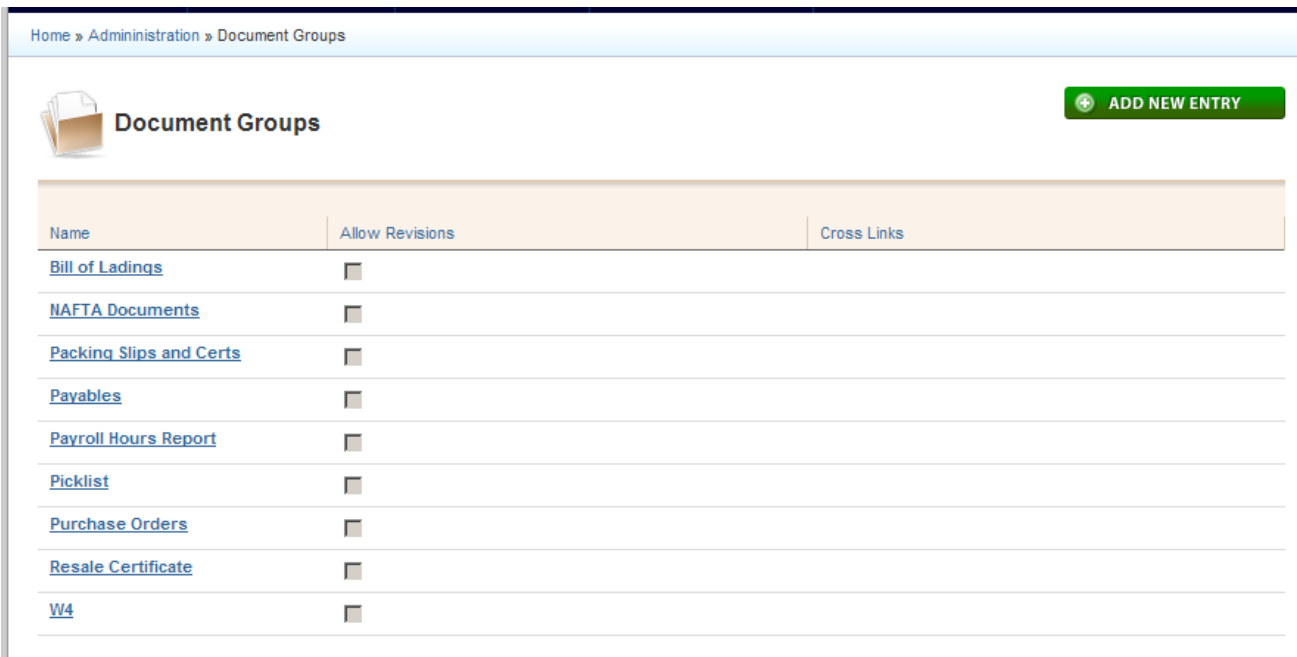
All documents that are scanned and processed on FileitSuite are stored on your server under the folders /pending/ (for scanned documents) or /documents/ (for processed documents). When you create a document group, the documents that are scanned and processed for that group are stored under the subfolders /pending/<group name>/ and /documents/<group name>/.

For example, if your business has a purchasing department, you can create a document group called Purchasing, which in turn creates storage space on FileitSuite for that group. All documents for that group will be stored on FileitSuite in the following folders:

/pending/purchasing/  
/documents/purchasing/

To view a list of Document Groups that currently exist in the FileitSuite database, make the menu selection **Administration**→**Document Groups** from the menu bar. The Document Groups page will be displayed.

Initially, the Document Groups page will be blank. Click on the ADD NEW ENTRY button to create a new document group. Once created, the name, revisions flag, and cross links information for the document group will be displayed on the Document Groups page. You can click on a name on the list to edit that document group's information.



Name	Allow Revisions	Cross Links
<a href="#">Bill of Ladings</a>	<input type="checkbox"/>	
<a href="#">NAFTA Documents</a>	<input type="checkbox"/>	
<a href="#">Packing Slips and Certs</a>	<input type="checkbox"/>	
<a href="#">Payables</a>	<input type="checkbox"/>	
<a href="#">Payroll Hours Report</a>	<input type="checkbox"/>	
<a href="#">Picklist</a>	<input type="checkbox"/>	
<a href="#">Purchase Orders</a>	<input type="checkbox"/>	
<a href="#">Resale Certificate</a>	<input type="checkbox"/>	
<a href="#">W4</a>	<input type="checkbox"/>	

**Name:** This is the name of the document group (or subfolder).

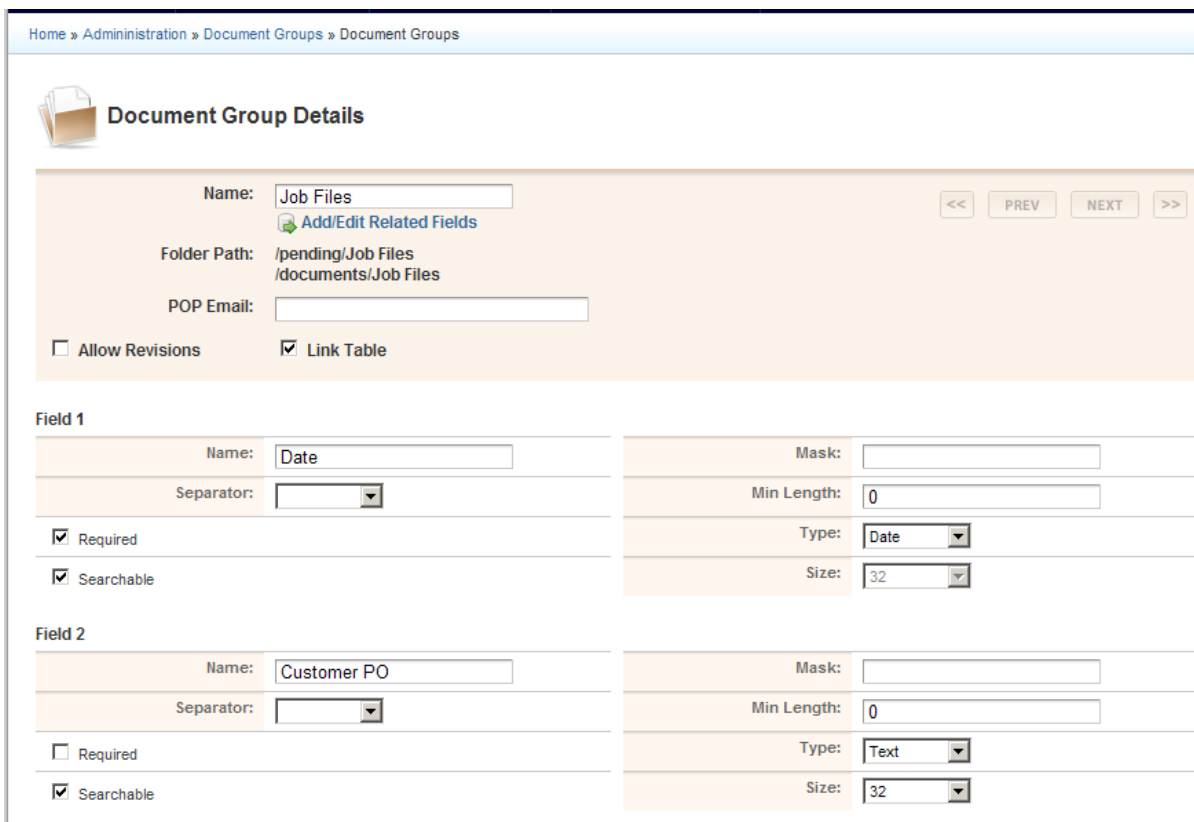
**Allow Revisions:** This box will be checked if revisions are allowed for the documents in this group.

**Cross Links:** If this document has any cross links, they will be listed here. Cross links are names of parameters from other document groups that are linked to this document group. Refer to the section “[Master Document Groups](#)” for more information on cross links.


## How to Add or Edit a Document Group

To add a document group, click on the ADD NEW ENTRY button from the Document Groups page. To edit a document group, click on the name of the document group you wish to edit.

The Document Group Details page will appear. The information you use to fill in the fields will be used by FileitSuite to set up the pages that get displayed when a FileitSuite user chooses to process, search, or upload a document. The top part of the page looks like the following, with the ability to add or edit up to five fields:



Home » Administration » Document Groups » Document Groups

 **Document Group Details**

Name:  << PREV NEXT >>  
Add/Edit Related Fields

Folder Path:

POP Email:

Allow Revisions     Link Table

**Field 1**

Name: <input type="text" value="Date"/>	Mask: <input type="text"/>
Separator: <input type="text" value=""/>	Min Length: <input type="text" value="0"/>
<input checked="" type="checkbox"/> Required	Type: <input type="text" value="Date"/>
<input checked="" type="checkbox"/> Searchable	Size: <input type="text" value="32"/>

**Field 2**

Name: <input type="text" value="Customer PO"/>	Mask: <input type="text"/>
Separator: <input type="text" value=""/>	Min Length: <input type="text" value="0"/>
<input type="checkbox"/> Required	Type: <input type="text" value="Text"/>
<input checked="" type="checkbox"/> Searchable	Size: <input type="text" value="32"/>

**Name** – Enter a name for the document group, for example Invoices.

If you edit the name of an existing document group (in other words you clicked on a name on the Document Groups page), a new folder path will *not* be created for the new name in order to retain the old folder’s name. For example, if you edit “Job Files” to “Jobs”, the folders **/pending/Job Files** and **/document/Job Files** will be renamed to **/pending/Jobs** and **/document/Jobs**. All the files that were contained in the Job Files folders are

now in the Jobs folders. If you want the Jobs folders to exist separate from the Job Files folders, then you need to click on the ADD NEW ENTRY button on the Document Groups page.

**Add/Edit Related Fields Button**– Click on this button to display another page of fields to enter information for cross links. Refer to the section “[Master Document Groups](#)” for more information on cross links.

**Folder Path** – This non-editable field displays the subfolder names on the server where documents for this group will be stored.

**POP Email** – FileitSuite can retrieve documents from an e-mail mailbox and upload them into the system. Once uploaded, the Pending Process List will be updated and the file will need to be processed. Enter an e-mail address from which FileitSuite is to upload documents.

**Link Table** – Check this box to indicate that this is a master document group. Master document groups work together with cross links when accessing documents in the FileitSuite database. Refer to the section “[Master Document Groups](#)” for more information on this document group.

**Field 1 (up to 5 fields can be specified)** – these fields are used to set up the web pages when a user chooses to scan, process, upload, or search for a document.

**Name** – Enter the name of a field that will be used to request an input value when uploading, processing, or searching documents by, for example “Invoice #”.

**Mask** – Enter a format that the input value is required to follow. For example, if you specify a mask of “#####-##” for a field called Invoice Number, the user must enter an Invoice Number in the format 12345-67 when processing or searching for a document in this document group.

**Min Length** – Enter the minimum number of characters required for the input value of this field..

**Type** – Select a type (Text or Date) from the pull-down menu for this field. If it is a date, a calendar icon will be displayed next to the field when processing or searching for a document.

**Size** – Select a size (32, 64, 128, 256 or 512) from the pull-down menu that will be used to limit the number of characters for the input value of this field.



**Required** – Check this box if an input value is required for this field.

**Searchable** – Check this box if you want the capability to search by this field.

The bottom part of the Document Group Details page displays the names of all the users that have been created to have access to FileitSuite. Refer to the section “[How to Add or Edit a User](#)” for more information on this feature.

Allowed Users

<input type="checkbox"/> BILL QUIST	<input type="checkbox"/> CAROL GARZA	<input type="checkbox"/> CHRISTINA KEITH	<input type="checkbox"/> Daisy Gallardo
<input type="checkbox"/> DANIEL BOLES	<input type="checkbox"/> David Brummet	<input type="checkbox"/> Debbie Richards	<input type="checkbox"/> demo User
<input type="checkbox"/> DENNIS WAGNER	<input type="checkbox"/> Diana Soto	<input type="checkbox"/> Doreen Wilson	<input type="checkbox"/> ELAINE SANTIAGO
<input type="checkbox"/> Greg Richards	<input type="checkbox"/> HENRY CHAPA	<input type="checkbox"/> Ivy Zahn-Tully	<input type="checkbox"/> JEROME JOHNSON
<input type="checkbox"/> Jim Caviglia	<input type="checkbox"/> Jodi Jud	<input type="checkbox"/> JOHNNY QUILENDERINO	<input type="checkbox"/> JUDY MENDEZ

**Allowed Users** – In this area, you can choose what users have access to the documents for this document group. Click on the boxes to add a checkmark for the users that you wish to have access to the documents for this document group. To remove access for a user, simply click on the checked box for that user and the check mark will be removed. If a user is allowed access for this document group, he or she will be able to view and select the document group name in any of the pull-down menus within FileitSuite.

**SAVE Button** – Click on this button to create or save the document group into the FileitSuite database. If this is a new document group, its name will now be displayed on the Document Groups page. It will also be displayed when creating or editing a user that has access to FileitSuite. In addition, it will be listed in any pull-down menu that lists the document groups, for example when doing a search.

When creating a document group, by default, no users are given access privileges, in other words none of the user checkboxes are checked. If a document group is created after a user has been created, then by default the user will not see the document group name when uploading or searching documents. To give the user access privileges to this document group, edit the document group and add a checkmark to his or her name, or edit the User and add a checkmark next to the new document group name. Refer to the section “[How to Add or Edit a User](#)” for more information.

**DELETE Button** –This button is only available if you are editing an existing document group. Click on this button to delete the document group from FileitSuite.

**CANCEL Button** – Click on this button to cancel any changes made for a document group. If you were in the process of adding a new group, the group will not be added to FileitSuite. If you were in the process of editing an existing group, the values for that group will remain unchanged.

**PREV and NEXT buttons** – These buttons are disabled when adding a new document group. Click on these buttons if you would like to edit or view the document group information for the various groups that currently exist in FileitSuite. Be sure to save any changes to the current document group before clicking on these buttons.

## *How to Delete a Document Group*

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To delete a document group, click on the name of the document group to delete on the Document Groups page. The Document Group details page will appear; scroll to the bottom. Click on the DELETE button to remove this document group for the FileitSuite database. You will be asked to confirm that you wish to delete this document group. This includes all the files and cross links contained by the document group. Click on OK to delete the document group from FileitSuite, or click on CANCEL to discard this delete request.

## Master Document Groups

FileitSuite has a feature that allows you to search and view documents across several document groups. To set up this feature, a master document group must be created. It is basically the same as any document group except that it has cross links, or references, that link it to other document groups by specified fields in those document groups. For example, this feature is useful in cases where the user would like to view all the documents related to a particular invoice number. There may be related documents for this invoice number with the purchasing, shipping, and payables document groups.

The purpose of a master document group is to provide a way to specify fields that link related documents across various document groups. Master document groups cannot be used to upload, process, or search for documents.

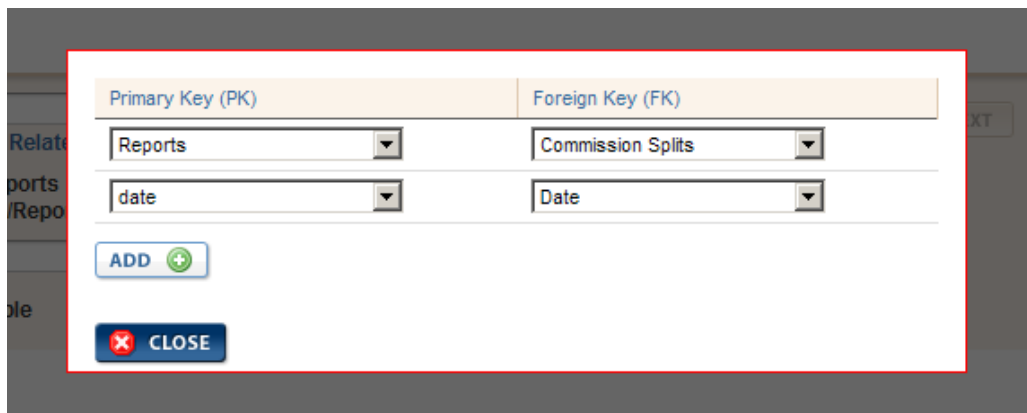
### How to Add a Master Document Group

The procedure to add or edit a master document group is similar to creating a regular document group. Once the Document Group Details page is displayed be sure to place a check mark in the “Link Table” check box to indicate that this is a master document group. Define the fields for this group as explained above.

The Add/Edit Related Fields link on this page is used to define cross links between this master document group and other existing document groups. NOTE: If you select this link when you first create this master document group, the fields in the resulting popup window will be empty. You must first save the master document group before values will be visible in this window.

### Cross Links

To define cross links for an existing master document group, make the menu selection **Administration** → **Document Groups** from the navigation bar and click on the master document group name you wish to edit. From the Document Group Details page, click on Add/Edit Related Fields and a popup window will appear.



Primary Key (PK)	Foreign Key (FK)
Reports	Commission Splits
date	Date

ADD +

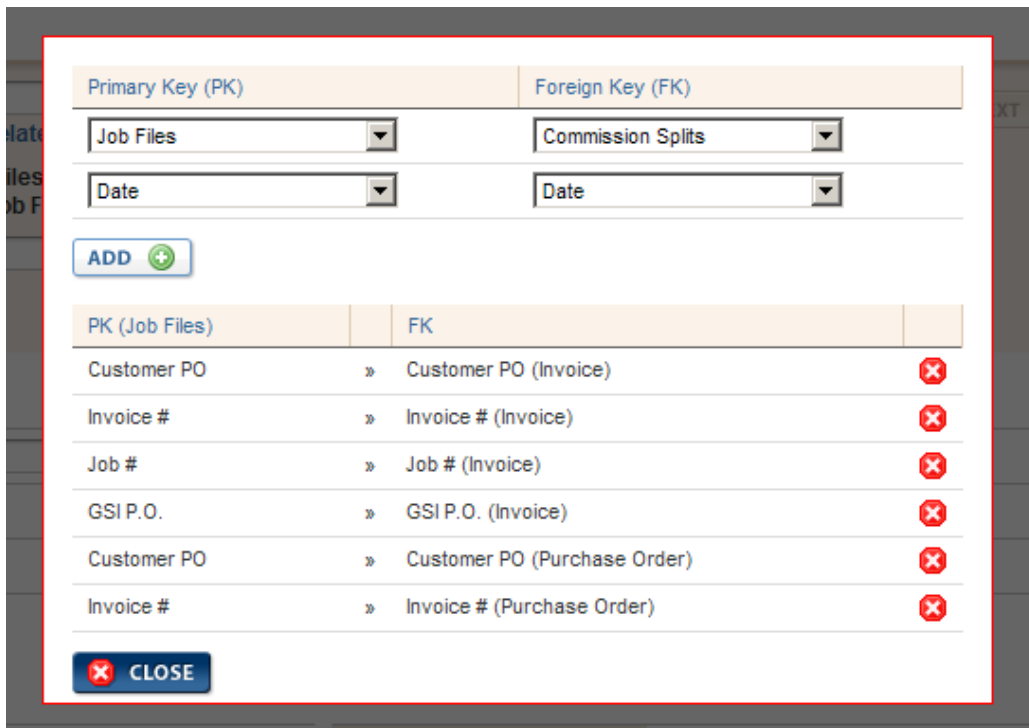
CLOSE X

The Primary Key consists of two pieces of information. The first pull-down menu contains the name of this master document group. The pull-down menu below it contains the list of fields that have been defined for this master document group.

The Foreign Key also consists of two pieces of information. The first pull-down menu contains the name of all the document groups that have been defined for FileitSuite. The pull-down menu below it contains the names of all the fields that have been defined for the selected document group above it.

### How to Add a Cross Link

From the Related Fields popup window, select the field, or *primary key*, for this master document group that you wish to create a cross link for. Then select a document group and one of its fields, or *foreign key*, that you wish to link to the primary key. Select the ADD button to create the cross link. You can create as many cross links as you need. The popup window will be updated to display the cross links that you have added each time you select the ADD button.



To remove a cross link, simply click on the red circled “x” to the right of the cross link you wish to delete. Its name will be removed from the list. Click on the CLOSE button once you have completed defining the cross links for this master document group. The popup window will disappear and control will return to the Document Group Details page.

The Document Group Details page will be updated to display the cross links to the right of the window, just below the Pending Process List box:

The Document Groups page will also be updated to display the cross links if the “Link Table” checkbox is checked for that document group.


Name	Allow Revisions	Cross Links
<a href="#">Commission Splits</a>	<input type="checkbox"/>	
<a href="#">Drawings</a>	<input type="checkbox"/>	
<a href="#">E-Mails Body</a>	<input type="checkbox"/>	
<a href="#">Invoice</a>	<input type="checkbox"/>	
<a href="#">Job Files</a>	<input checked="" type="checkbox"/>	Customer PO(Invoice), Invoice #(Invoice), Job #(Invoice), GSI P.O.(Invoice), Customer PO(Purchase Order), Invoice #(Purchase Order)

## Email and FTP Maintenance

To set up the e-mail and FTP parameters for FileitSuite, click on the menu selection **Administration → Email and FTP Maintenance** from the navigation bar. The following page will appear:

Home » Administration » Email and FTP Maintenance

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 **Email and FTP Maintenance**

Email Server:	<input type="text"/>	FTP Address:	<input type="text"/>
User Name:	<input type="text"/>	User Name:	<input type="text"/>
Password:	<input type="text"/>	Password:	<input type="text"/>

FileitSuite has the ability to retrieve documents from an e-mail mailbox and upload them into the system. Each document group can specify a mailbox to retrieve documents from. The e-mail information here is used to tell FileitSuite what server the e-mail mailbox resides on. Note that this only works with .PDF documents.

**Email Server** – Enter the name of your e-mail server.

**User Name** – Enter a user name for this server.

**Password** - Enter the password for this user account.

The FTP information is used to tell FileitSuite what FTP server to use during document data transfers. The information is also used for scanning and manual document placement, for example from the desktop on your computer.

**FTP Address** – Enter the address of your FTP server.

**User Name** – Enter a user name for this FTP site.

**Password** – Enter the password for this user account.

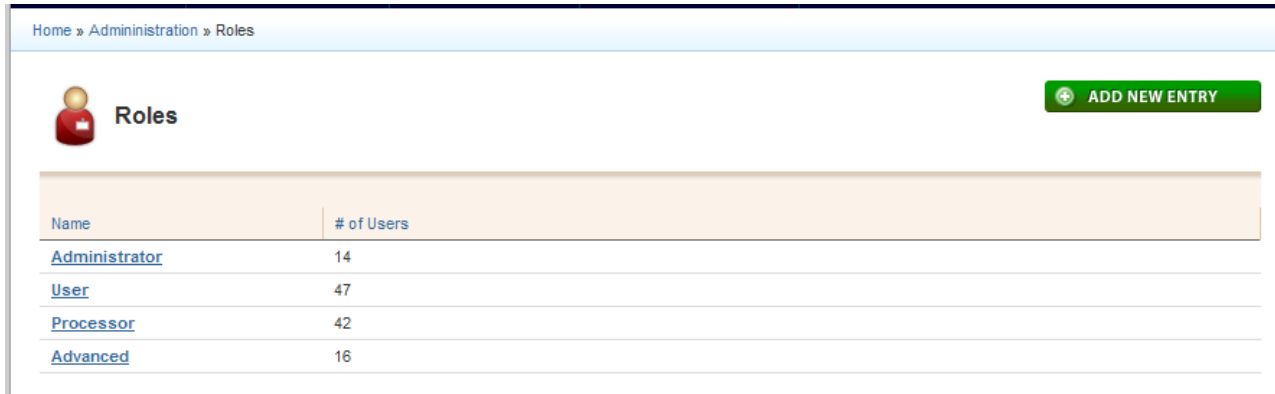
Click on the SAVE button to save the e-mail and FTP information into FileitSuite. Click on the CANCEL button to keep the previous information in FileitSuite.

## Roles

### *What is a Role?*

All users that have access to FileitSuite are assigned to a certain role. The role that a user has determines the kinds of access privileges he or she has in FileitSuite.

Click on the menu selection **Administration**→**Roles** from the navigation bar to display the Roles page.



Name	# of Users
<a href="#">Administrator</a>	14
<a href="#">User</a>	47
<a href="#">Processor</a>	42
<a href="#">Advanced</a>	16

Initially, the display will list the default roles that are predefined for FileitSuite. Click on the ADD NEW ENTRY button to create a new role. Once created, the name and “number of users” information for the role will be displayed on the Roles page. You can click on a name in the list to edit that role’s information.

**Name:** This is the name of the role.

**# of Users:** This is the number of FileitSuite users that have been assigned to the role.

Several roles are pre-defined for FileitSuite:

**Administrator** – A user with this role has access to everything.

**User** – A user with this role can only view documents.

**Processor** – A user with this role can view and process documents.

**Advanced** – A user with this role can view and upload documents but does not have processing privileges.

## *How to Add or Edit a Role*


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Click on the menu selection **Administration** → **Roles** from the navigation bar. The Roles page will appear. To add a role, click on the ADD NEW ENTRY button from the Roles page. To edit a role, click on the name of the role you wish to edit.

The Role Details page will appear:

Home » Administration » Roles » Role Details



---

 **Role Details**

<<    PREV    NEXT    >>

Name:

Description:

 **SAVE**     **CANCEL**

**Name** – Enter the name of the role you are creating or editing.

**Description** – Enter a description of what kinds of privileges a user assigned to this role will have in FileitSuite.

**SAVE Button** – Click on this button to save the role’s information into FileitSuite. If this is a new role, its name will now be displayed on the Roles page. It will also be displayed when creating or editing a user that has access to FileitSuite.

**DELETE Button** – This button is only available if you are editing an existing role. Click on this button to delete the role from the FileitSuite database.

**CANCEL Button** – Click on this button to cancel any changes made for a role. If you were in the process of adding a new role, the role will not be added to FileitSuite. If you were in the process of editing an existing role, the values for that role will remain unchanged.

**PREV and NEXT buttons** – Click on these buttons if you would like to edit or view the Role information for the various roles that currently exist in FileitSuite. These buttons are disabled when adding a new role.

### *How to Delete a Role*

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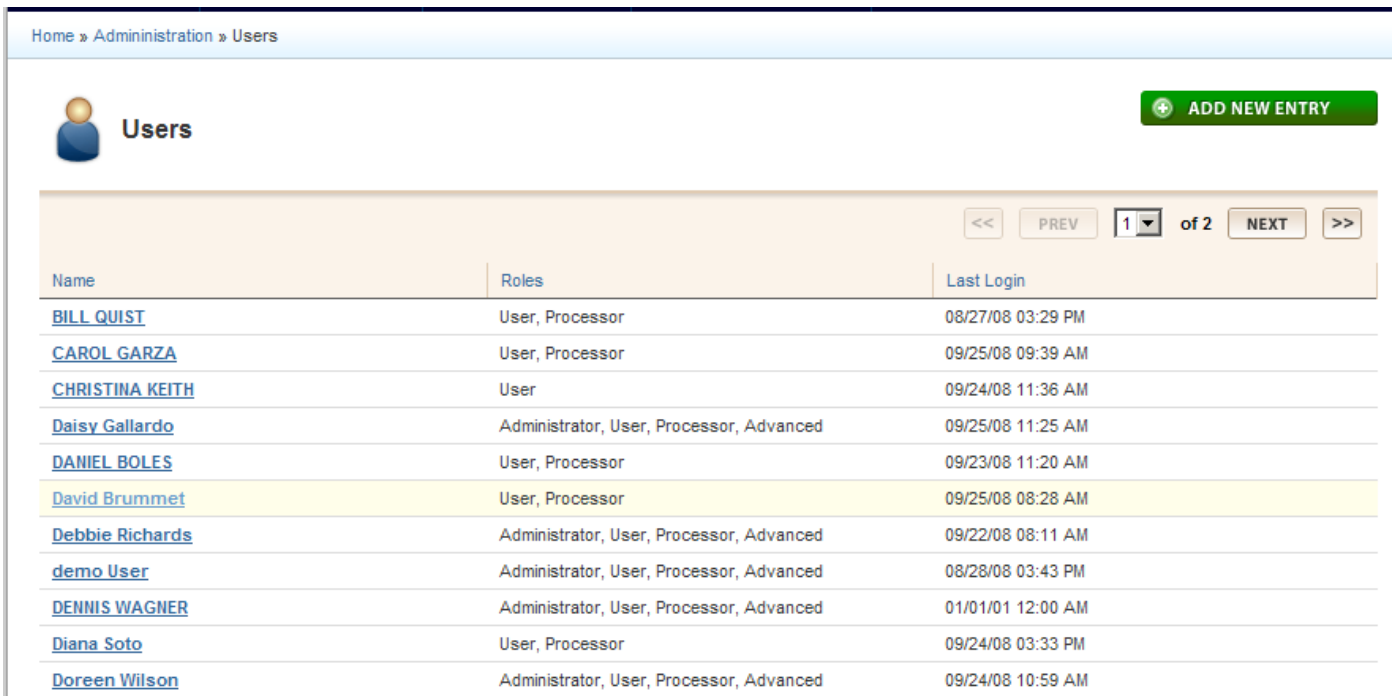
To delete a role, click on a name on the Roles page. The Role Details page will appear with a DELETE button. Click on the DELETE button; you will be asked to confirm you wish to delete the role. Click on OK to delete the role, or click on CANCEL to discard the delete request.

## Users

### What is a User?

Employees of your business are given access to the FileitSuite database by creating FileitSuite user accounts for them. Each user can be a member of one or more document groups and have one or more roles assigned to him or her. Their roles and document groups define the access privileges they have within FileitSuite.

Click on the menu selection **Administration->Users** from the navigation bar to display the Users page.



Name	Roles	Last Login
<a href="#">BILL QUIST</a>	User, Processor	08/27/08 03:29 PM
<a href="#">CAROL GARZA</a>	User, Processor	09/25/08 09:39 AM
<a href="#">CHRISTINA KEITH</a>	User	09/24/08 11:36 AM
<a href="#">Daisy Gallardo</a>	Administrator, User, Processor, Advanced	09/25/08 11:25 AM
<a href="#">DANIEL BOLES</a>	User, Processor	09/23/08 11:20 AM
<a href="#">David Brummet</a>	User, Processor	09/25/08 08:28 AM
<a href="#">Debbie Richards</a>	Administrator, User, Processor, Advanced	09/22/08 08:11 AM
<a href="#">demo User</a>	Administrator, User, Processor, Advanced	08/28/08 03:43 PM
<a href="#">DENNIS WAGNER</a>	Administrator, User, Processor, Advanced	01/01/01 12:00 AM
<a href="#">Diana Soto</a>	User, Processor	09/24/08 03:33 PM
<a href="#">Doreen Wilson</a>	Administrator, User, Processor, Advanced	09/24/08 10:59 AM

Initially, the display will be blank. Click on the ADD NEW ENTRY button to create a new user. Once created, the name, roles, and last login information for the user will be displayed on the Users page. You can click on a name in the list to edit that user’s information.

**Name:** This is the name of the user.

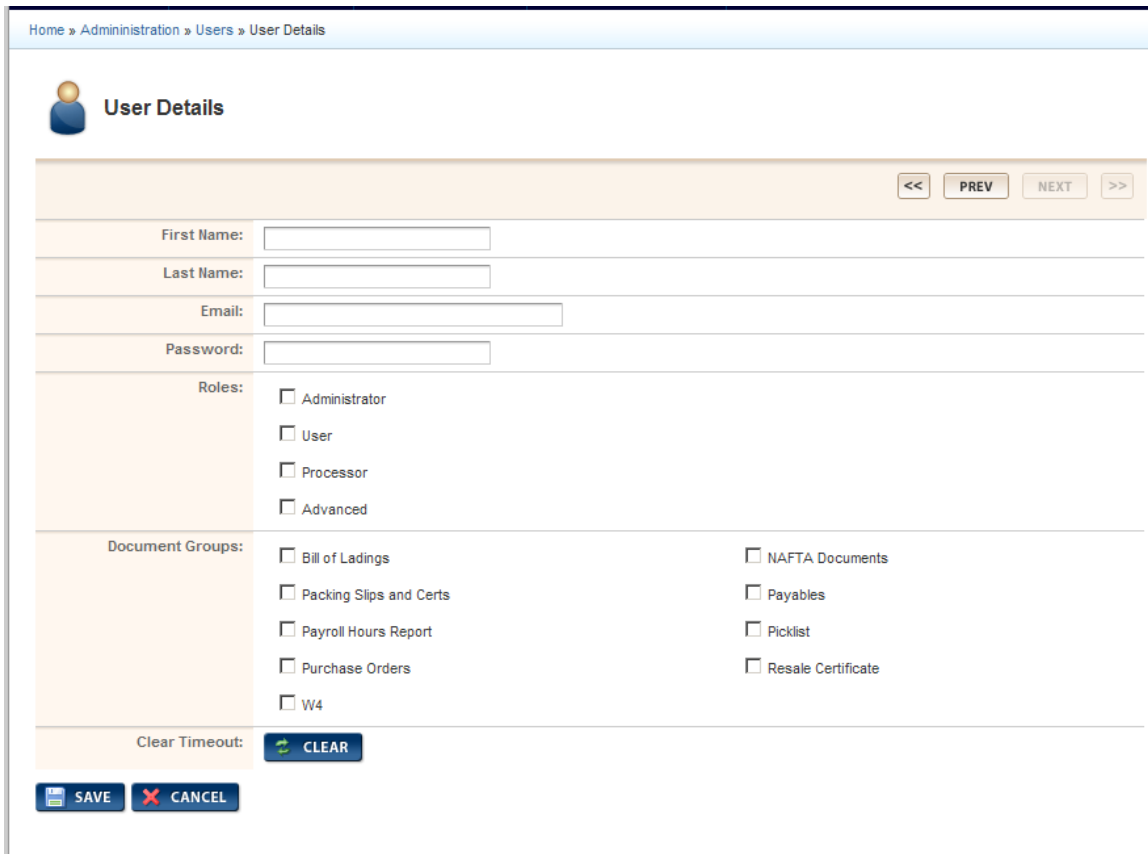
**Roles:** These are the roles that the user has been assigned to.

**Last Login:** This is the date and time the user last logged on to FileitSuite.


## How to Add or Edit a User

Click on the menu selection **Administration** → **Users** on the navigation bar to display the Users page. To add a user, click on the ADD NEW ENTRY button from the Users page. To edit a user, click on the user name you wish to edit.

The User Details page will appear:



Home » Administration » Users » User Details

 **User Details**

<< PREV NEXT >>

First Name:

Last Name:

Email:

Password:

Roles:

- Administrator
- User
- Processor
- Advanced

Document Groups:

- Bill of Ladings
- Packing Slips and Certs
- Payroll Hours Report
- Purchase Orders
- W4
- NAFTA Documents
- Payables
- Picklist
- Resale Certificate

Clear Timeout:

**First Name, Last Name** – Enter the first and last names of the employee for which you are creating a user.

**Email** – Enter the e-mail address for this employee in the format name@domain.com.

**Password** – Enter the password for the specified e-mail account.

**Roles** – Click on the boxes to add a checkmark for all the roles that you wish this user to have. To remove roles for a user, simply click on the checked box for that user.

**Document Groups** – Click on the boxes to add a checkmark to all the document groups that you wish this user to be a member of. To remove the user from a document group, simply click on the checked box for that user.

**CLEAR button** – Click on this button if the user is currently locked when using the FileitSuite application; it causes FileitSuite to clear the user’s cache and allow the user to continue work.

**SAVE Button** – Click on this button to save the user’s information into FileitSuite. If this is a new user, its name will now be displayed on the Users page. It will also be displayed when creating or editing a document group.

**DELETE Button** – This button is only available if you are editing an existing user. Click on this button to delete the user from the FileitSuite database.

**CANCEL Button** – Click on this button to cancel any changes made for a user. If you were in the process of adding a new user, the user information will not be added to FileitSuite. If you were in the process of editing an existing user, the information for that user will remain unchanged.

**PREV and NEXT buttons** – Click on these buttons if you would like to edit or view the User information for the various users that currently exist in FileitSuite. These buttons are disabled when adding a new user. Be sure to save your changes to an existing user before clicking on these buttons or the changes will be lost.

### *How to Delete a User*

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To delete a user, click on a name on the Users page. The User Details page will appear; scroll to the bottom of the page. Click on the DELETE button; you will be asked to confirm you wish to delete the user. Click on OK to delete the user, or click on CANCEL to discard the delete request.

## Utilities

The administrator of FileitSuite is provided with several utilities that allow him or her to view information on users, documents, files, and folders on FileitSuite. To access these utilities, move your mouse over the menu selection Administration→Utilities. A drop-down menu will appear with the following selections:

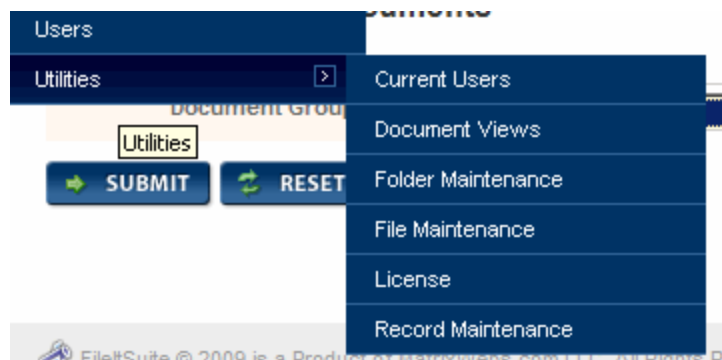
**Current Users**: This menu selection will display a list of users that are currently logged in to FileitSuite.

**Document Views**: This menu selection will display information on what documents have been scanned and by which users.

**Folder Maintenance**: This menu selection will display usage information of storage space in FileitSuite.

**File Maintenance**: This menu selection will take you to the Search for Documents page.

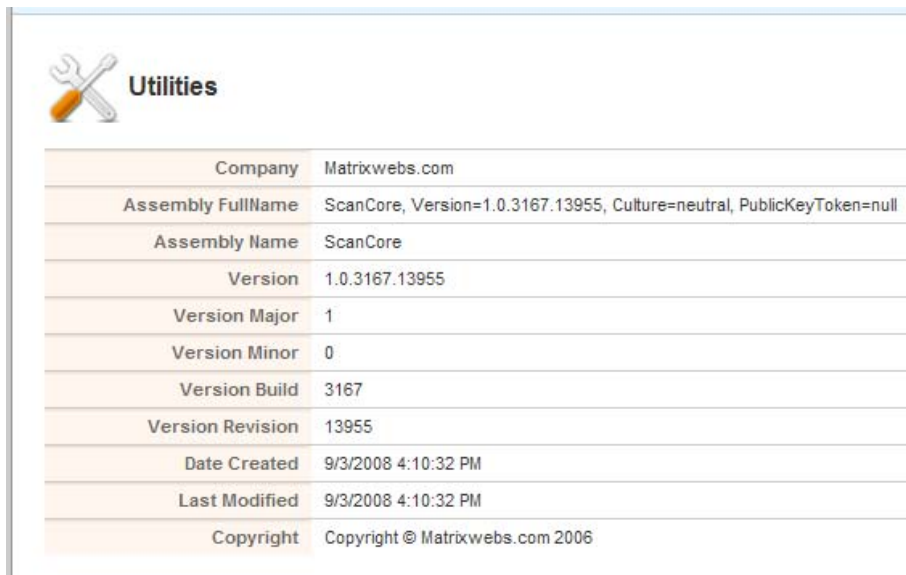
**License**: This menu selection allows you to request a new software license or upgrade your current software license.



**Record Maintenance:** This menu selection will remove any documents that have a size of zero bytes from FileitSuite.

If you click on **Administration**→**Utilities** without selecting anything from the drop-down menu, a page will be displayed with a link called “Version”. Click on this link to display information about the FileitSuite software being used.

For example:

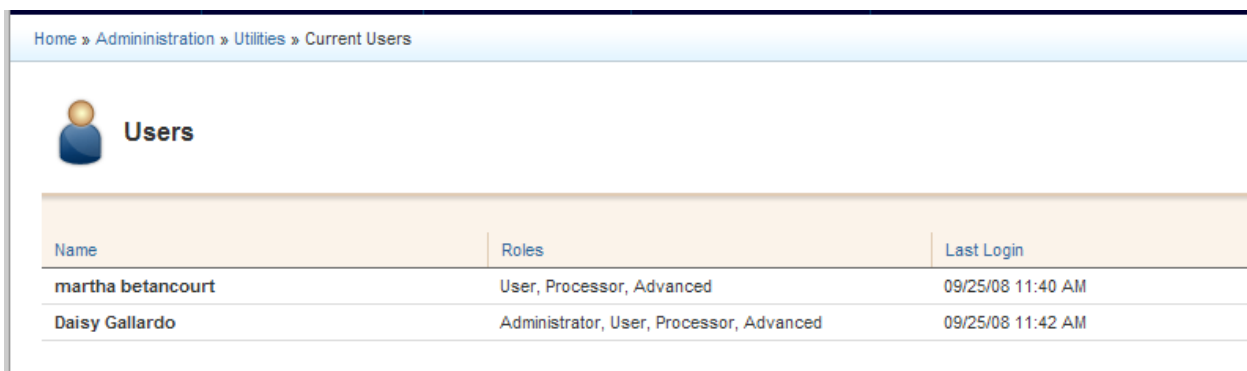


The screenshot shows the 'Utilities' page with a table of system information. The table has a light orange header and alternating light orange and white rows. The data is as follows:

Utilities	
Company	Matrixwebs.com
Assembly FullName	ScanCore, Version=1.0.3167.13955, Culture=neutral, PublicKeyToken=null
Assembly Name	ScanCore
Version	1.0.3167.13955
Version Major	1
Version Minor	0
Version Build	3167
Version Revision	13955
Date Created	9/3/2008 4:10:32 PM
Last Modified	9/3/2008 4:10:32 PM
Copyright	Copyright © Matrixwebs.com 2006

## Current Users

To view information about the users that are currently logged in to FileitSuite, make the menu selection **Administration**→**Utilities**→**Current Users** from the navigation bar. This will display the Users page with the following information:



The screenshot shows the 'Current Users' page with a table of active users. The table has a light orange header and alternating light orange and white rows. The data is as follows:

Users		
Name	Roles	Last Login
martha betancourt	User, Processor, Advanced	09/25/08 11:40 AM
Daisy Gallardo	Administrator, User, Processor, Advanced	09/25/08 11:42 AM

**Name:** This is the name of the user currently logged in to FileitSuite.


**Roles:** These are the roles that the user has been assigned to.

**Last Login:** This is the date and time the user last logged on to FileitSuite.

## Document Views

To view information about what documents have been viewed on FileitSuite and by which user, make the menu selection **Administration**→**Utilities**→**Document Views** from the navigation bar. This will display the Document Views page that lists following information:

Home » Administration » Utilities » Document Views

 **Documents Views**

<< PREV 1 of 2 NEXT >>


User Name	# of Documents
<a href="#">BILL QUIST</a>	2
<a href="#">CAROL GARZA</a>	223
<a href="#">CHRISTINA KEITH</a>	461
<a href="#">Daisy Gallardo</a>	2
<a href="#">DANIEL BOLES</a>	117
<a href="#">David Brummet</a>	148
<a href="#">Debbie Richards</a>	0
<a href="#">demo User</a>	2
<a href="#">DENNIS WAGNER</a>	0
<a href="#">Diana Soto</a>	219
<a href="#">Doreen Wilson</a>	45
<a href="#">ELAINE SANTIAGO</a>	330
<a href="#">Greg Richards</a>	11
<a href="#">HENRY CHAPA</a>	305

**User Name:** This is the name of the user that has access to FileitSuite. Click on a name to view a list of documents this user has viewed.

**# of Documents:** This is the number of documents that have been viewed by this user.

Use the NEXT and PREV button to page through the list or click on a number to go to that page in the list. If you would like to see what documents were viewed by a particular user, click on a user name in the Document Views page. The Document View Details page will be displayed with the following information:

Home » Administration » Utilities » Document Views » Document View Details

 **Document View Details**

Path	File Date	Last Viewed	View Count
http://kra.matrixscansuite.com/documents/Payables/4/fae5199d76634c64a1313228f	1/1/0001	9/24/2008	1
http://kra.matrixscansuite.com/documents/Payables/4/bd3b068530ab48f3beae4381e	1/1/0001	9/24/2008	2

**Path:** This is the file path on the server where this document is located.

**File Date:** This is the date that the document was uploaded.

**Last Viewed:** This is the date that the file was last viewed by this user.

**View Count:** This is the number of times the document was viewed by this user.

Use the NEXT and PREV button to page through the list or click on a number to go to that page in the list.





### ***Folder Maintenance (Disk Usage)***

When you create a document group, you are essentially creating subfolders on your server in which to store documents. By default, each subfolder is assigned 600 MB (megabytes) of storage space. Once the subfolder is full, another subfolder is created for the document group. A document group may have multiple subfolders of storage space.

To view storage information regarding FileitSuite, make the menu selection **Administration**→**Utilities**→**Folder Maintenance** from the navigation bar. This will display the Folder Maintenance page that lists the following information:

Home » Administration » Utilities » Folder Maintenance

### Folder Maintenance

Folder	Usage	Percent Used	Usage	Total Space
Bill of Ladings		25%	150.27 MB	600.00 MB
NAFTA Documents		0%	846.71 KB	600.00 MB
Packing Slips and Certs		64%	383.18 MB	600.00 MB
Payables		0%	1.34 MB	600.00 MB
<b>Total Space Used</b>			<b>22.03 GB</b>	

**Folder:** This is the name of the current folder for an existing document group.

**Usage:** This is a visual indicator of how much storage is used by the current folder. The darker area represents the amount of storage used.

**Percent Used:** This is the percentage value of storage space used by the current folder.

**Usage:** This indicates how much space is used by the current folder.

**Total Space:** This is the total amount of space being used to store documents for the document group. This includes the space that all subfolders for this document group occupy on FileitSuite.

At the bottom of the page, “**Total Space Used**” indicates the total amount of storage space used by the current folders for each document group. This does *not* include the subfolders that are 100% used by the document groups.

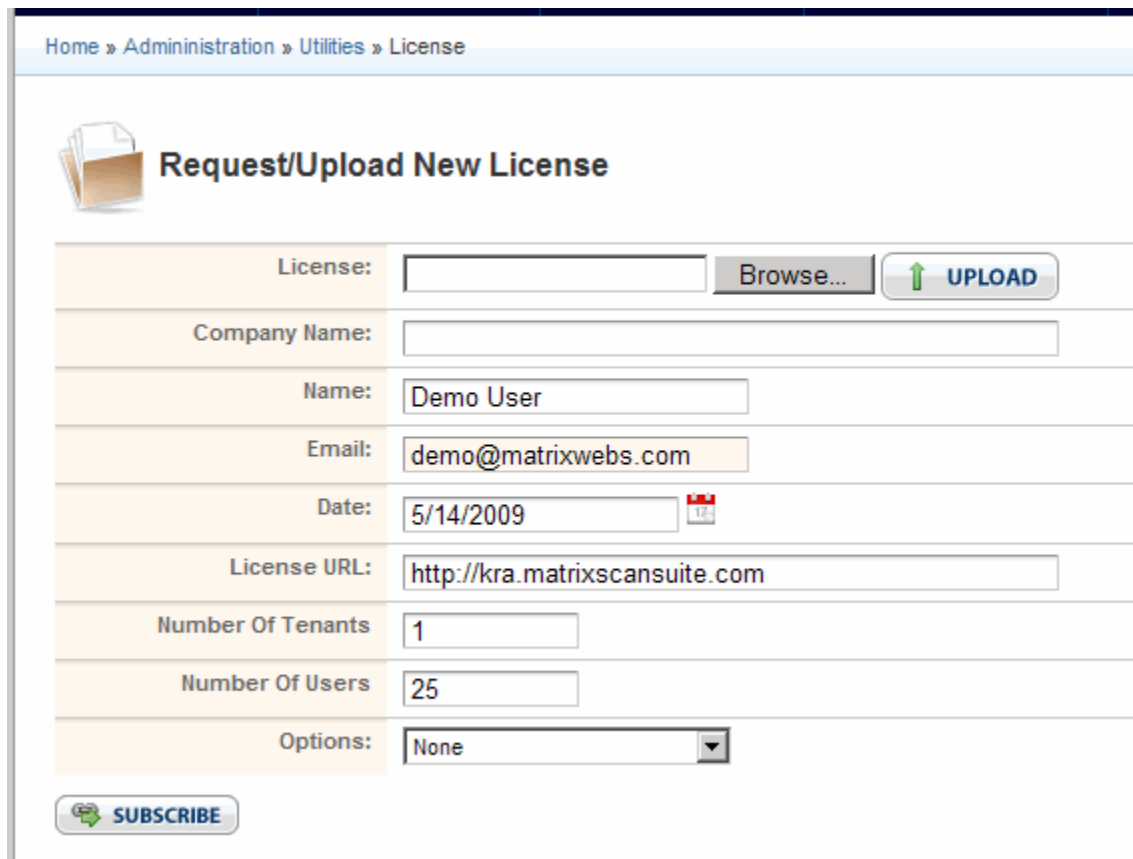
## File Maintenance

To perform file maintenance on the documents in FileitSuite, make the menu selection **Administration**→**Utilities**→**File Maintenance** from the navigation bar. This will bring up the Search for Documents page. Refer to the section “[Search for Documents](#)” for more information on this topic.

## License

Before your company can use the FileitSuite software, you must request a software license. If you already have a license for FileitSuite, you can request an upgrade to your license.

To request or upgrade your license, make the menu selection **Administration**→**Utilities**→**License** from the navigation bar. The Request/Upload New License page will appear:



Home » Administration » Utilities » License

### Request/Upload New License

License:	<input type="text"/>	<input type="button" value="Browse..."/>	<input type="button" value="↑ UPLOAD"/>
Company Name:	<input type="text"/>		
Name:	<input type="text" value="Demo User"/>		
Email:	<input type="text" value="demo@matrixwebs.com"/>		
Date:	<input type="text" value="5/14/2009"/>	<input type="button" value="📅"/>	
License URL:	<input type="text" value="http://kra.matrixscansuite.com"/>		
Number Of Tenants	<input type="text" value="1"/>		
Number Of Users	<input type="text" value="25"/>		
Options:	<input type="text" value="None"/>		

**License** – If you already have a license and are requesting an upgrade, enter the name of the license file. Or click on the Browse button to bring up the File Selection window. From here you can browse the files on your computer or network and make your selection.

**Company Name** – Enter the name of your company.

**Email** – Enter your email address where you can be contacted.

**Date** – Enter the date. By default, the current date will be filled in.

**License** – Enter the site for which you are requesting a license.

**Number of Tenants** – Enter the number of FileitSuite software applications you are requesting a license for.

**Number of Users** – Enter the total number of users this site will have.

**Options** – Select a maintenance package that you would like to include as part of your subscription to FileitSuite.

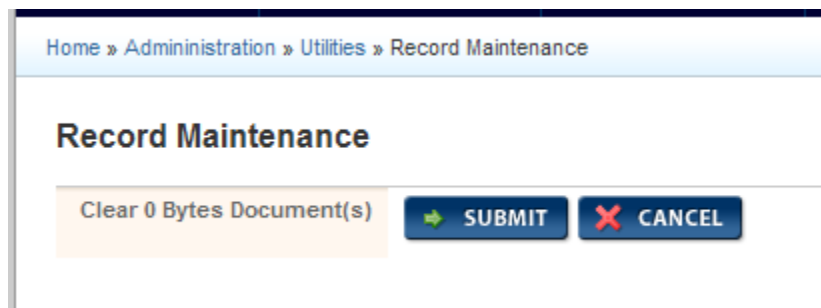
**SUBSCRIBE Button** – Click on this button to submit your request to Matrixwebs. You will be contacted by a Matrixwebs representative to set up or upgrade your license.

## ***Record Maintenance***

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Sometimes, when document scans or uploads fail, or when corrupt files are scanned or uploaded into FileitSuite, a file is created on FileitSuite with 0 bytes allocated to it. Record maintenance allows you to clean up FileitSuite and remove the empty files from the server.

To perform record maintenance on documents in the FileitSuite database, make the menu selection **Administration→Utilities→Record Maintenance** from the navigation bar. This will display the following page:



Click on the SUBMIT button to remove any documents in the system that have a size of zero bytes. Click on the CANCEL button to cancel this operation.

## ***Error Tracking***

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To be implemented.

# **PROCESS DOCUMENTS**

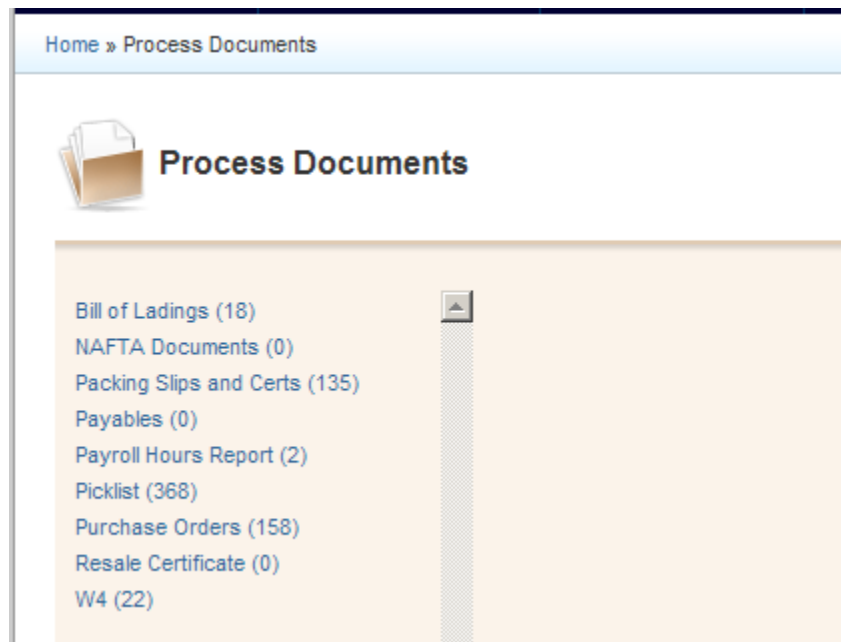
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Once documents are scanned into the FileitSuite system, they are ready to be processed, in other words reviewed and saved into the database. The Pending Process List is always displayed in a gray box in the top right corner of FileitSuite's pages. This indicates the total number of documents that have been scanned and are waiting to be processed so that they can be stored in the FileitSuite database.

FileitSuite can store documents of various file types. However, the .PDF format is the recommended and preferred file type for FileitSuite.


## The Process Documents Page

To begin processing pending documents, click on the link in the gray **Pending Process List** box or make the menu selection **Process Documents** from the navigation bar. The Process Documents page will appear. Initially, the left side of the screen will list all the document groups, and the right side will be blank. Each document group will have a number next to it in parentheses. This number indicates how many documents are pending for that group.



Click on the document group that you wish to process documents for. The right side of the screen will be updated to list the pending documents for that group.

Home » Process Documents

 **Process Documents**

Bill of Ladings (18)    <<    PREV    1    NEXT    >>  
 NAFTA Documents (0)  
 Packing Slips and Certs (135)  
 Payables (0)  
 Payroll Hours Report (2)  
 Picklist (368)  
 Purchase Orders (158)  
 Resale Certificate (0)  
 W4 (22)

Name	Size	Uploaded
0e979366623347cab8e8d506a1e331e5.pdf	86.20 KB	9/25/2008 10:28:10 AM
e9666bc81ae74e7cafe82936ed52feed.pdf	87.29 KB	9/25/2008 10:28:09 AM
8a438e9e7ca94d84a32aad605d7e36ae.pdf	84.88 KB	9/25/2008 10:28:09 AM
5334e8ca31f04a0fa1bf60be49c06131.pdf	82.26 KB	9/25/2008 10:28:09 AM
37d90f54d28c4bd1b3f553def3e74265.pdf	86.29 KB	9/25/2008 9:58:41 AM
51f5563c938a45038bcde46b5f645211.pdf	83.59 KB	9/25/2008 9:58:41 AM
49000930ff6b45e0a908560922b4c152.pdf	86.01 KB	9/25/2008 9:58:41 AM
780b0507d6174c799ead24468013aa9.pdf	84.11 KB	9/25/2008 9:58:41 AM
8244f85ffb054ffb84107869c8dc7d4b.pdf	85.84 KB	9/25/2008 9:58:40 AM
54b355d51561407c8753f6f9e232fb44.pdf	85.50 KB	9/25/2008 9:58:40 AM

<<    PREV    1    NEXT    >>

The list includes the following information:

**Name:** This is the name of the document that is waiting to be processed. Various file types can be scanned into FileitSuite, however most documents will be in .PDF format.

**Size:** This is the size of the document, in kilobytes (KB).

**Updated:** This is the date and time that the document was scanned into FileitSuite.

## How to Process a Document

Click on a document name that you wish to process and the Process Document Details page will appear. This page displays the scanned document with several controls, similar to Adobe Reader, which allow you to print, save, view, and page through the scanned document.

Verify that the scanned document is in order. Examples of things to look for:

- Make sure all the data is readable. For example, verify that highlighted data on the original document is not a solid black line on the scanned document.
- Make sure the pages for the document were scanned properly. For example, sometimes a page feeds through the scanner at an angle and not all the data is included in the scan.
- Make sure the document is complete. For example, make sure all the pages of the original document got scanned – sometimes pages stick together through the scanner.

The Process Document Details page also has an area for you to enter metadata. This data is used for storing the document in FileitSuite and performing searches for that document. Any field that has a “\*” in front of it indicates that you are required to enter a value. The input fields for the metadata may vary for documents in other document groups. If the input field must follow a specific format, the format will be displayed after the field name, for example:

Invoice #: \_\_\_\_\_ #####-##

The string “#####-##” indicates the format of the invoice number, such as 12233-01.

Once you have entered the necessary metadata, click on one of the buttons shown. The following action will be taken, depending on which button you select:

**SAVE & CONTINUE** – Click on this button to save the document into FileitSuite and continue to the next pending document for this document group.

**SAVE** – Click on this button to save this document into FileitSuite and return to the Process Documents page.

**DELETE** – Click on this button to delete the scanned document from FileitSuite. You will be asked to verify that you wish to delete the scanned document from the system. Once the scanned document is deleted, it is no

longer available for processing or storing in FileitSuite. You will have to re-scan the document if you want to store it in FileitSuite.

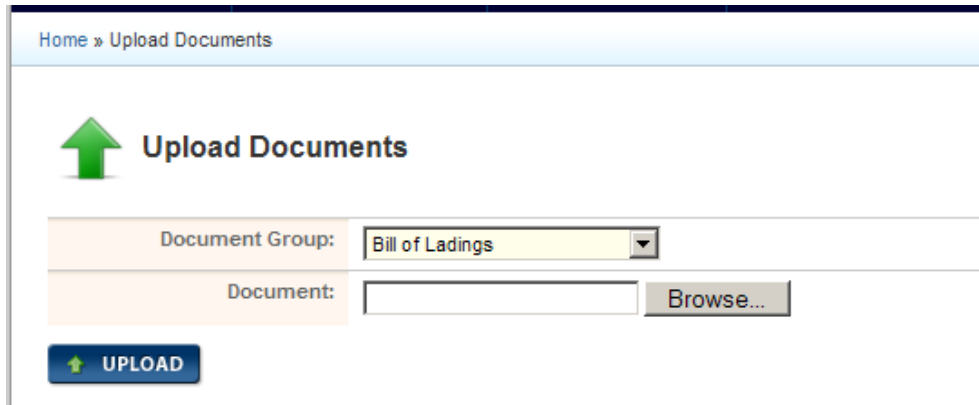
**CANCEL** – Click on this button to discard any changes and leave the scanned document as pending.

**NEXT** – Click on this button to display the next scanned document for this document group that is waiting to be processed. Changes will not be saved for the currently viewed document.


## UPLOAD DOCUMENTS

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FileitSuite allows you to upload documents that are currently on your computer rather than scanning them in. Make the menu selection **Upload Documents** from the navigation bar and the Upload Documents page will appear.




Home » Upload Documents

 **Upload Documents**

Document Group:

Document:

 **UPLOAD**

Enter the following information:

**Document Group** – Select a document group from the pull-down menu for which this document is being uploaded.

**Document** – Enter the path and filename for the document that you wish to upload. You can type the information manually or click on the Browse button to browse the files on your computer or network and make your selection.

Once you are done entering the information, click on the **UPLOAD** button. The document you specified will be uploaded into FileitSuite and added to the Pending Process List.

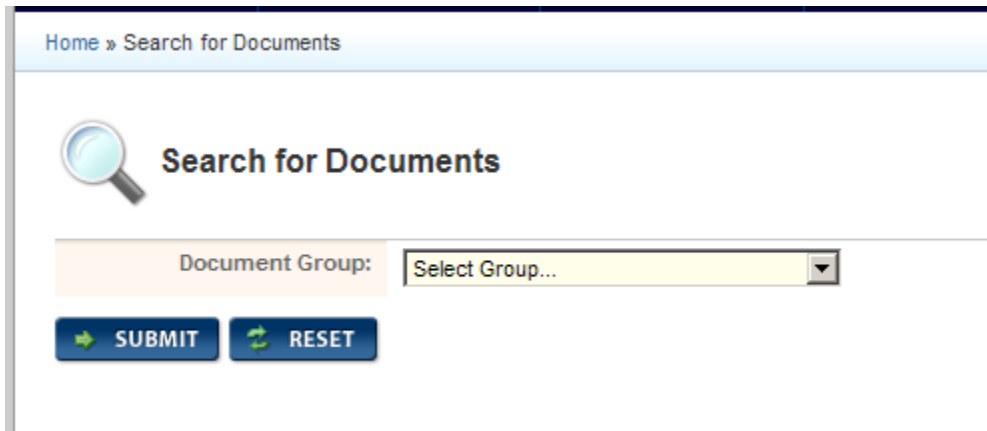
## SEARCH FOR DOCUMENTS

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A large volume of documents can be stored in FileitSuite. You have the capability to perform various types of searches depending on the search parameters you specify:

- Search for one or more documents within a document group
- Search for one or more documents within several document groups
- Search for one or more documents within all document groups

To search for documents in FileitSuite, click on the menu selection **Search for Documents** from the navigation bar. The Search for Documents page will appear where you can select a document group for which you would like to search documents.



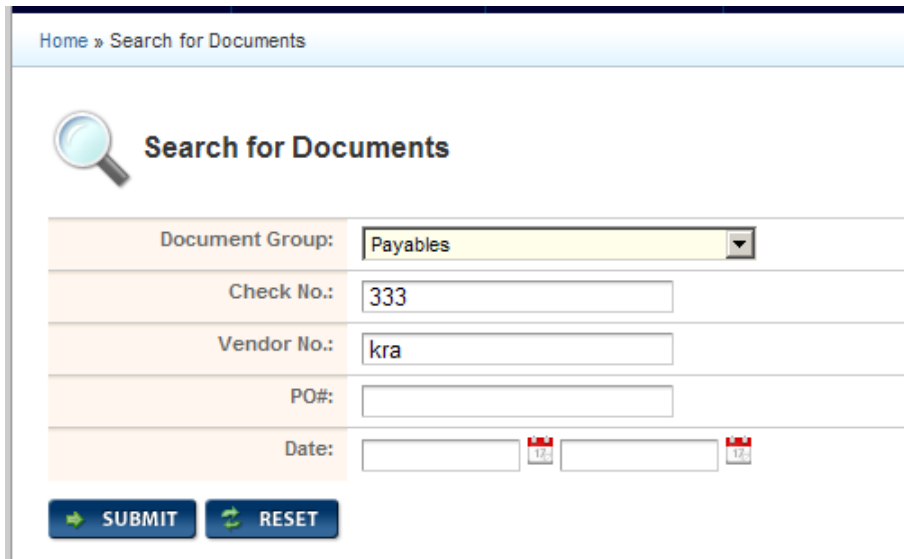
Home » Search for Documents

 **Search for Documents**


Document Group:

### To Search within a Document Group

Once you select a document group to search, the Search for Documents page is updated to display search fields to enter information for. The search fields vary depending on which document group you select. For example, the document group “Bill of Ladings” may need information for the invoice number or customer P.O. number, and the document group called “Payables” may need information for the check number, vendor number, P.O. Number, or Date. Fill in one or more of the fields to define your search parameters. The more information you specify, the narrower your search becomes.



Home » Search for Documents

 **Search for Documents**

Document Group:	Payables
Check No.:	333
Vendor No.:	kra
PO#:	
Date:	<input type="text"/> <input type="text"/>

Once you have entered the information you want, select the SUBMIT button to begin the search. If some or all of the search parameters you have specified is inaccurate and you wish to start over, select the RESET button to remove all the data from the page so you can re-enter your search parameters.

Refer to the section “[Search Results](#)” below to see what information is displayed after a search is complete.

## To Search within Several Document Groups

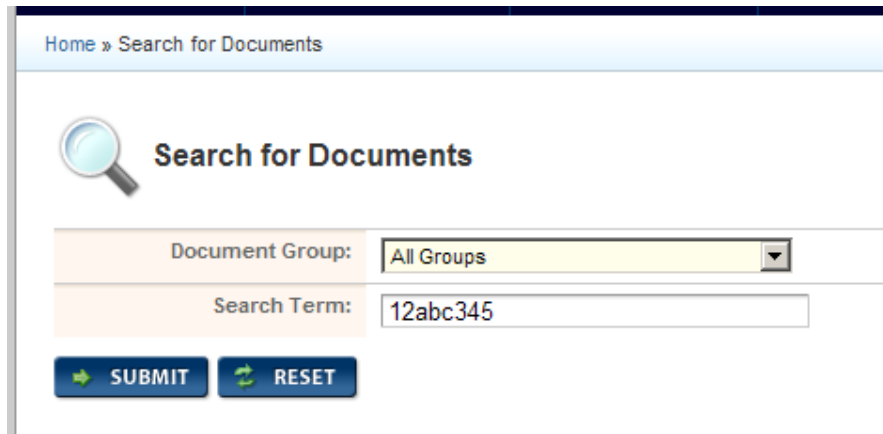
To search within several document groups, a master document group must be defined with cross links to other document groups. Refer to the section “[Master Document Groups](#)” for more information on how to set up a master document group.

For example, the Invoices document group has a field called Invoice Number. The Purchases document group has a field called Order Number. The Invoices document group is defined by the administrator as the master document group. A cross link has also been defined between the Invoice Number of the Invoices document group and the Order Number of the Purchases document group.


To search for documents based on an invoice number of the Invoices document group, select the Invoice document group from the Search Documents page, specify an invoice number, and click on the SUBMIT button. This procedure is similar to searching from a single document group. However the results page will be slightly different. Refer to the section “[Search Results](#)” below.

## To Search within All Document Groups

To search for one or more documents within all document groups, select “All Groups” from the Document Group pull-down menu of the Search for Documents page. The page will be updated to display the input field “Search Term”. Enter a string of text that you would like to search for within all searchable fields of the documents in FileitSuite.



Home » Search for Documents

 **Search for Documents**

Document Group: All Groups

Search Term: 12abc345

**SUBMIT** **RESET**

Once you have entered the information you want, select the SUBMIT button to begin the search. If some or all of the search parameters you have specified is inaccurate and you wish to start over, select the RESET button to remove all the data from the page so you can re-enter your search parameters.

## Search Results

If documents are found that match your search parameters, the Search for Documents page will be updated to display the same search fields that you used with the information you entered, followed by the results of that search. Note that the search matches substrings. For example, if a search is done for check number “333”, any document that has a check number with the substring “333”, such as “33345” or “193332” will be on the results list.

Home » Search for Documents



### Search for Documents

Document Group:


Check No.:





Vendor No.:

PO#:

Date:    

---

 Results for 333

Check No.	Vendor No.	PO#	Date	Size	Type	
<a href="#">33307</a>	KRAYD		8/25/2008	169.75 KB		<a href="#">Edit</a>
<a href="#">33345</a>	KRA 401K		9/1/2008	73.62 KB		<a href="#">Edit</a>
<a href="#">33346</a>	KRAPS		9/1/2008	81.68 KB		<a href="#">Edit</a>
<a href="#">33348</a>	MCKRA		9/1/2008	79.93 KB		<a href="#">Edit</a>

Each document shown on the results list displays the information that matched your search. It also displays following:

**Size:** This is the size of the document found.

**Type:** This is the file type or format of the document found, for example .PDF.

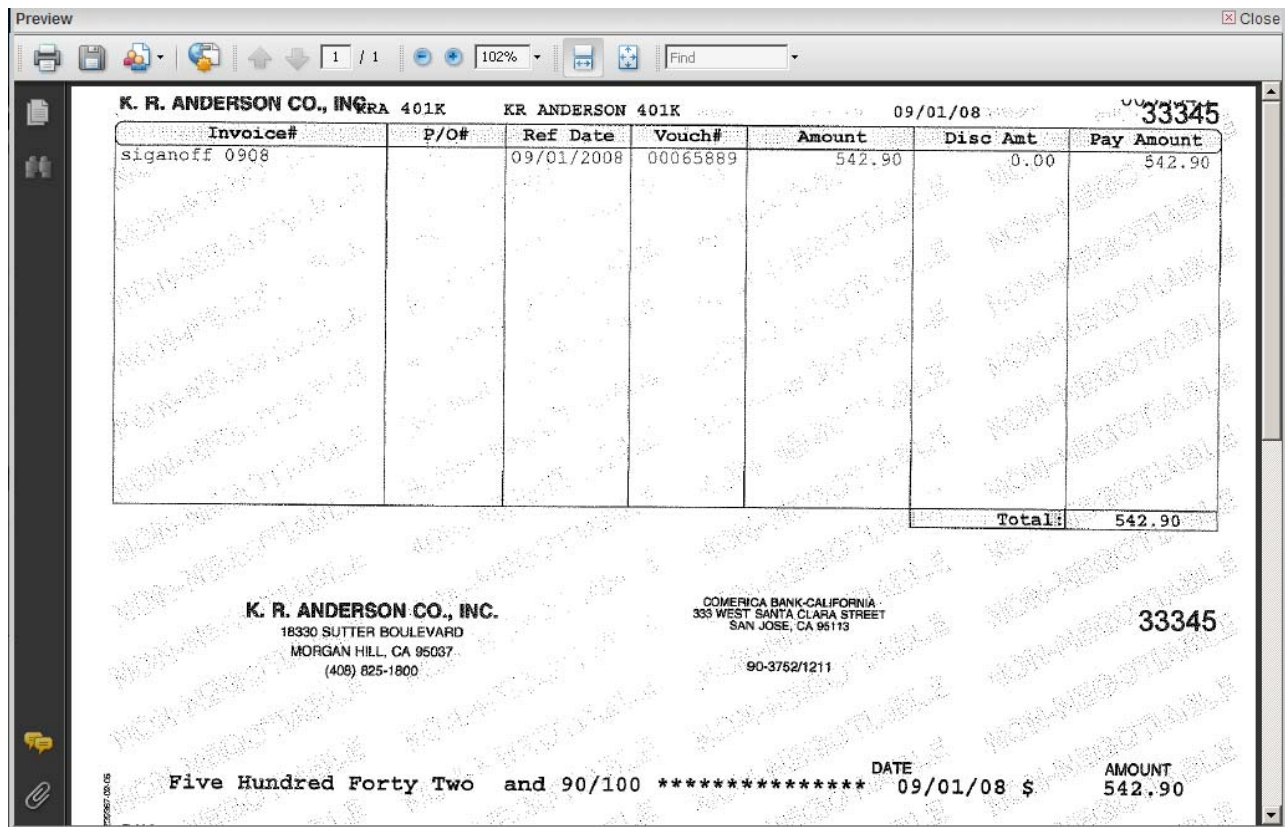
**“Edit”:** This link allows you to edit the found document. This link is only displayed to users that have processing privileges.

If a search was done against a master document group and related documents are found within other document groups, a link called “Related Documents” will appear to the right of the found document. Click on this link to view a list of documents found from other document groups as specified by the cross links in the master document group.

To continue our example from above with the Invoices and Purchases document groups, search for a particular invoice number within the Invoices document group. The results list will show the found document with a “Related Documents” link to the right of that document. Click on this link and another list will appear with the results of searching the Orders document group as well. You have the ability to view the documents from each document group individually or combine all the documents into one view. Refer to the section “[Master Document Groups](#)” for more information on master document groups.

## To View a Found Document

To view a document in the Search for Documents Results page, click on the document name or the document parameter that matched the search, for example 33345 under the Check No. column. A separate window will appear showing the document and several controls, similar to Adobe Reader, that allow you to print, save, view, and page through the document. Once you are done viewing the page, click on the “Close” button at the top right corner of the screen.



## To Edit a Found Document

To edit a document in the Search for Documents Results page, click on the word “Edit” for that document. The Process Document Details page will appear showing the document, the metadata, and the SAVE and CANCEL buttons. Refer to the section “[Process Documents](#)” for more information on the page. The metadata fields are editable, and initially contain the values that were entered when the document was processed or last edited. The document itself cannot be changed. Click on the SAVE button to save your changes for this document, or CANCEL to revert to the original values. The display will return to the Search Documents Results page.

