FileBound Automation Processes

What are Automation Processes?

Automation processes are events that can be scheduled to run at predetermined times. The events are able to perform many different actions such as starting documents into a workflow process, run and send report results, automatically index documents and OCR documents that are in the system.

How are Automation Processes Started?

Automation processes are iniated by the FileBound Service. When a process is created when and how often it should occur is configured. The FileBound Service monitors the FileBound site and determines when it is time for a process to run. The service will then kick-off the process.

What is the FileBound Service?

The FileBound Service is a Windows Service that can be installed on one or more utility servers or workstations that will monitor a FileBound site. The service communicates with the FileBound server every one minute to determine if it is time to start an automation process. FileBound allows services to be associated in groups. By associating the processes in groups priority can be assigned to make sure that the most important atuomation processes are run first before other non priortiy processes.

What expectations should I have about FileBound Automation Processes?

FileBound automation processes are intended to help with the routinue daily activities that occur with FileBound. For example, the Folder Import and Auto-Index processes can be helpful in indexing the 50 invoices a day that a user may scan into the system using a Multi-function copier. The processes will import the invoices and then use templates to index and save the invoices.

Automation processes are not intended for the initial document and file ingestion from a backlog of content or conversion from another system that could present the need of importing and indexing hunderds of thousands of items at a single time.

Automation Processes are best used when processing the daily needs of a business that does not have extremely high volumes of content that is processed during a day. Each process has it's own unique parameters that it works best within. These are parameters are listed for each of the different processes within this document.

FileBound Automation Processes

Active Directory Sync

An automation Process that will sync users between the Active Directory server and the FileBound server on a scheduled interval.

Benefit:

A system administrtor does not have to access FileBound to sync users with their Active Directory system after the users have been added to, or removed, from their Active Directory setup.

Use Case:

A university uses FileBound to store various students' information. The university has over 500 users. On a daily basis users are added and removed from the groups that have access to the FileBound system. The Active Directory sync process can be configured to run on a 1 hour interval to automatically keep the users in FileBound in sync with the current users that are configured within Active Directory.

Items of Note:

- This process will only work for FileBound premise based systems.
- This process will not synch users that are in nested groups within the Active Directory system.

Recycle Bin Cleaner

An automation process that will remove items from the Recycle Bin on a set schedule.

Benefit:

Prevents a system administrator, or other user with Recycle Bin rights, from having to access the Recycle Bin and manually remove items.

Use Case:

A FileBound implementation has a requirement that all content that has been deleted by a user must be able to be restored for 30 days after it was deleted. After 30 days the content can be permanently removed from the system. The automatic removal can be made an automated process that occurs at 3:00 am every day.

Item of Note:

- Only 250 items will be removed per scheduled run.

FileBound Automation Processes

Scheduled Report

An automation process that will automatically generate a report on a set schedule and email the report to a defined user as a PDF or CSV.

Benefit:

Commonly accessed reports can be automatically generated and sent to the appropriate people for review.

Use Case:

A department manager needs to know how users are interacting with documents in the system. This process can run the Document Activity report for the previous day and send it to the manager.

Items of Note:

- Will not work with any dashboards.
- Custom Reports are not supported.
- Reports with 1250, or fewer, records in the report results will be sent. If the report contains over 1250 records the report will not be sent.

Scheduled Workflow

An automation process that will find files or documents on a set schedule and automatically route them down a workflow process.

Benefit:

Allows FileBound to find content that is not in a workflow process and route content based on the conditions that are specified. Using the find criteria, located files can have e-forms generated for those files as well.

Use Case:

On an annual basis employees need to sign off on a company benefits document. A process can be created to find all employees, generate the Benefits Acknowledgement form and route it to the user for approval.

Items of Note:

- Will only process up to 1000 items at a time.
- If a find returns more than 1000 items to process the Scheduled Workflow process will not run.
- Only supports workflow processes. Older V4/V5 workflow routes are not supported.

FileBound Automation Processes

Auto-Index

An automation process that will process documents in the Indexing Queue with a status of “New”, match them to an indexing template and save the document in the appropriate project or to the quality control queue.

Benefit:

Documents can be automatically indexed based on defined templates, thus eliminating the need for employees to have to spend the time indexing documents to files or having to use Capture to perform this function. If any documents fail to match a template a user can be notified with a link to the document where they can Point and Click index the document.

Use Case:

A company gets invoices sent to them from various locations (Mail, Email, Fax). Instead of a user having to use a capture product to get all of the invoices in and index these invoices they are all sent to the Indexing Queue and automatically indexed by the matched templates.

Items of Note:

- This process only supports the following document format types: .tif, .tiff, .xls, .xlsx, .doc, .docx, .pdf
- Supports both File Templating and Document Type Templating
- PDF document types must be 100 pages or less

Auto-OCR

An automation process that will process documents in the Indexing Queue with a status of “New”. OCR will be performed on the documents and made available for Point and Click indexing within the Indexing Queue.

Benefit:

Having documents in the Indexing Queue that are Point and Click ready significantly increases the speed for users to be able to index documents to files. This allows a user to simply click on the word on the page or rubber band around a grouping of words to use for the index information. This removes the need to manually enter all information.

Use Case:

A company is scanning packing slips when shipments are received. These documents are scanned at the receiving doc into the Indexing Queue. Since there is no common document layout that can have a template applied the Auto-OCR process will prep the document to allow a user to Point and Click index the document within the Indexing Queue.

Item of Note:

- This process only supports the following document format types: .tif, .tiff, .xls, .xlsx, .doc, .docx, .pdf

FileBound Automation Processes

E-mail Import

An automation process that will import e-mail message, or attachments, from a defined mailbox and import them into the Indexing Queue or to a defined project using the From, Subject and Received date as index fields.

Benefit:

This process allows email messages and/or attachments to be automatically entered into FileBound without user interaction and moved to a deleted folder if necessary. This removes the steps of users having to save attachments to the desktop and then have to manually upload into a file.

Use Case:

A company gets invoices from vendors sent to multiple users within a company. The users then all forward the emails to a single email inbox. The process is setup to watch this inbox and imports the invoices into the Indexing Queue and moves the imported emails to the deleted items folder.

Items of Note:

- This process must be executed using a locally installed enterprise service when being used with a Cloud site.
- For Microsoft Exchange this only supports Exchange 2007 SP1 or 2010 SP1 and SP2.
- Supports imports from Microsoft Exchange, Hotmail, Gmail, Yahoo Mail and any custom defined POP3 or IMAP connection.

Folder Import

An automation process that will import documents from a defined network folder into the Indexing Queue. The individual documents can be imported as single documents or broken into separate documents using a blank page or FileBound barcode break sheet.

Benefit:

The folder import process is an automated way to upload documents into the Indexing Queue from single or multiple network locations such as documents scanned from an MFP device to a network folder.

Use Case:

An office administrator receives many different bills, contracts, and invoices in the mail everyday. The administrator has a multi-function copier beside his desk that is programmed to scan to a network folder. The Folder Import process is configured to upload scanned documents in this folder every 15 minutes. This will put the documents into the Indexing Queue that will allow individuals who know more about the document to index them and file them into the appropriate projects.

Items of Note:

- When used on a FileBound Cloud site the process must be run using a locally installed FileBound Service.
- This process was intended for smaller imports (1000 documents or less) and not large backlog imports.

FileBound Automation Processes

Global Search

An automation process that automatically stores information from selected project scopes and associates group right access. The information can then be found when a global search is performed. The following scopes are supported by Global Search: Project Name, File Notes, File Indexes, File Key Field, Separator Name, Divider Name, Document Notes, Document Name, Document Full Text, E-form Data, E-form Details, E-form Extra Data, Routed Item Comments, Text Annotations

Benefit:

By using the global search process to cache data from the system users can easily search any data they want to retrieve back in a very timely process. The result list that is returned also allows the user to see where their search result was found, such as a project name, e-form data, divider name or other defined scopes.

Use Case:

A FileBound system is used to store invoices, purchase orders, checks and receiving documents for a hardware store. The store commonly needs to search to see what has been ordered and received from a vendor as well as what they have been charged and paid. Configuring the system to use the Optimized Search feature of FileBound and running the Global Search Process will allow a user to search on a Vendor Name and the system will return all items in the system that contains the Vendor Name in all of the different areas such as index fields, file notes, document notes, full text information, etc.

Items of Note:

- When used on a FileBound Cloud site a locally installed FileBound CAN NOT be used.
- If any group rights are changed for an existing group after a global search process has run it is recommend to re-run a full global search cache again to allow the content to be properly located.

Renditions

An automation process that will generate renditions of .doc, .docx, .xls, .xlsx and .pdf file formats

Benefit:

Creating renditions of documents like word documents and PDF allow them to be fully supported for viewing on all mobile devices along with MAC operating systems.

Use Case:

A FileBound implementation has the requirement that most users will be using mobile devices to access documents. Most of the documents however are word and PDF documents which cannot be viewed on some mobile devices. This process is run daily making these documents viewable for all users on their mobile devices.

Items of Note:

- This process only supports the following document format types: .tif, .tiff, .xls, .xlsx, .doc, .docx, .pdf
- A maximum 1000 items will be processed during a scheduled run.

FileBound Automation Processes

Site-OCR

An automation process that will process documents within defined projects and perform OCR on the documents so that they will be located during a full text search.

Benefit:

Performing OCR on documents using the Site-OCR process allows users to search meta-data that is on a document when index field searching is not enough. As an added benefit highlighting words on page option with the Site-OCR process will highlight the searched words within the viewers yellow as long as it is a tiff image.

Use Case:

Contracts are stored within a project and are added to the system by many different people in a business. The contracts can be added using the Indexing Queue, Integration Kit, Capture, and by a Folder Import process. These contracts are commonly found by entering identifying keywords into the Full Text search field. To make sure that all of the documents can be located during a search running the Site-OCR process will guarantee that all of the documents are OCR'd.

Items of Note:

- Only 250 documents will be processed per scheduled run.
- Is not intended for large back-log OCR such as a backlog of 500,000 documents.
- Site-OCR supports the following formats: .pdf, .tif, .tiff, .xls, .xlsx, .doc, .docx

Social Media Import

An automation process that will import current day data from social media entries into a project in an HTML format.

Benefit:

FileBound is able to automatically search for and store social media records for historical purposes. This can maintain a record of these social media entries even if they are deleted later from the socila meida site.

Use Case:

A company is very conscious of their brand identity and wants to be proactive in promoting their brand positivitly. A Social Media Process can be configured to search for the companys name in Twitter posts. This process can run on the hour every day. Someone in the marketing department can have this report automatically sent to them and reviewed. If a comment about possible poor customer service can be proactively responded to by having the employee reach out to the poster via Twitter to help resolve the issue and foster a positive experience with the user experiencing difficulties.

Items of Note:

- Currently only Twitter is supported.
- Only current day media entries will get imported so this is recommended to be run daily at the end of the day.

FileBound Automation Processes

The following chart displays the available automation processes and the edition of FileBound that they are available with. All editions will still need to have at least one FileBound service running against the site to initialize the start of any one of the processes.

	FileBound Edition		
Process Name	**Document Management**	**Workflow**	**Enterprise**
Active Directory Sync	X	X	X
Global Search	X	X	X
Recycle Bin Cleaner	X	X	X
Renditions	X	X	X
Auto-Index			X
Auto-OCR			X
Scheduled Workflow			X
Scheduled Reports			X
Site-OCR			X
Email Import			X
Folder Import			X
Social Media Import			X

FileBound Automation Processes

Frequently Asked Questions

The following are some of the commonly asked questions when using Automation Processes.

Why are my processes not starting even though I scheduled it to run at 4:00pm?

This can be because you only have one service installed that is being overworked. The service waits until the other processes finish before staring this process that was originally scheduled at 4:00pm. If there are other processes that were running at 4:00pm this process will not start until the others have finished. Monitoring the performance of the service and adding multiple services specified to different server groups would help. Dedicating a service to a process that takes longer to run, such as Site-OCR, is recommended. This is especially true in the cloud environment where processes that have a higher priority to be completed might be better served by utilizing a local service to run the process.

What is the project filter in the Find stencil for?

This allows you to segregate different process functions for different document types. For example, you can use a Folder Import process to import HR documents to a HR project that then has a Auto-OCR process to prepare it for Click Indexing. You my have another E-mail Import process that is importing invoices to an Accounts Payable project that will be processed with an Auto-Index process. Using the project filter within the Find stencil allows you to configure the Auto-OCR process to only find documents for the HR project to be processed by the Auto-OCR process and to configure the Auto-Index process to only find documents for the Accounts Payable process to be processed by the Auto-Index process. If this was not done the Auto-OCR process could possibly be run on the invoices. If this was to happen the documents would be OCR and left in the indexing queue and never processed by the Auto-Index process that would properly apply a template and file the document away in the system.

Why are e-mail messages not being sent from my processes?

The service has a SMTP setup that must be configured. In this configuration area a valid SMTP server must be entered that will actually perform the sending of the messages that the service passes to it. The service does not perform the actual sending of the message.

I am using a FileBound Cloud site, do I need to install the FileBound Service?

Within the FileBound cloud datacenter there is a pool of FileBound services that are allocated to monitor all FileBound Cloud sites. These FileBound Services are shared across all FileBound Cloud sites. It is recommended that if a process is time sensitive that a FileBound Service is installed locally at a client location and run against their FileBound Cloud site. Locally installed FileBound services will not be able to run the Global Search automation processes for FileBound Cloud sites.