



Introduction to Filebound and the CRA Process

Training Guide

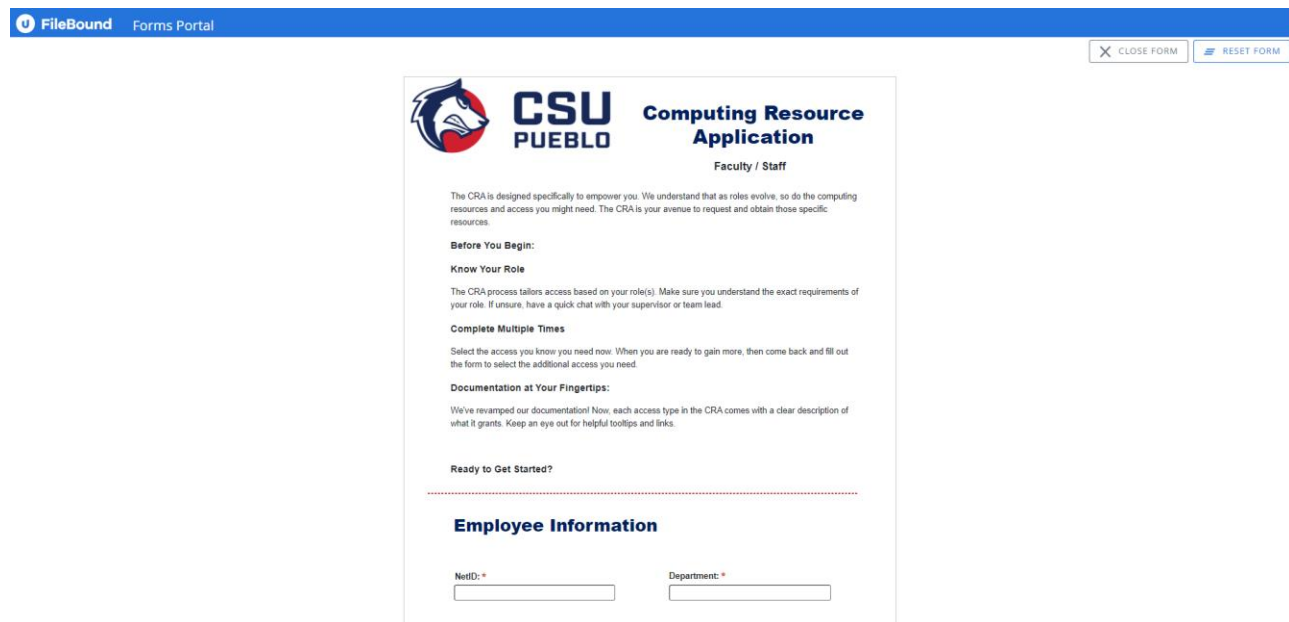
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Submitting a CRA Form

Our Computing Resource Application (CRA) form is used to request new access and process additional change requests. Please use this form any time you need to request additional access to our systems. To Access the CRA form please use this link: <https://www.csupueblo.edu/information-technology/services-and-systems/computing-resource-application.html>

Note: Please keep in mind a CRA does not need to be submitted for things like a basic personal email or employee email, internet access, Microsoft Office, Banner access, Teams creation, or Blackboard access.



FileBound Forms Portal

X CLOSE FORM RESET FORM

CSU PUEBLO Computing Resource Application
Faculty / Staff

The CRA is designed specifically to empower you. We understand that as roles evolve, so do the computing resources and access you might need. The CRA is your avenue to request and obtain those specific resources.

Before You Begin:

Know Your Role

The CRA process tailors access based on your role(s). Make sure you understand the exact requirements of your role. If unsure, have a quick chat with your supervisor or team lead.

Complete Multiple Times

Select the access you know you need now. When you are ready to gain more, then come back and fill out the form to select the additional access you need.

Documentation at Your Fingertips:

We've revamped our documentation! Now, each access type in the CRA comes with a clear description of what it grants. Keep an eye out for helpful tooltips and links.

Ready to Get Started?

Employee Information

NetID: Department:

Steps:

- For faculty and staff, click **"FACULTY/STAFF CRA"** to start a faculty and staff CRA request. For student employees, click **"STUDENT EMPLOYEE CRA"** to start a student employee CRA request.
- For **Faculty/Staff CRA**, most of the employee information fields will **auto-populate** by entering your **NetID**. For **Student Employee CRA**, all the employee information fields need to be **manually** filled.
 - The "Different Supervisor" option allows you to enter a different supervisor than the one shown after auto populating. Only **select "Different Supervisor"** and **enter** the correct **supervisor information**.
 - Note:** A new Faculty/Staff's information will be automatically sent to Filebound after their contract is activated. If a CRA needs to be submitted before the contract starts, submit a Student Employee CRA.
- In the next two sections, **select all the access** that is being **requested**.
- If you are **only selecting** options from the **Additional Access** section, you need to **enter your name** and click **Submit**.
 - Note:** This will kick off the workflow for those areas immediately. No other information is needed.

4. If **any** of the options from the **Access Required** section are **checked**, **extra information** will be **required** depending on the access selected.
 - a. **Note:** The sections for the access types that were not selected will be grayed out.
5. *Scroll down* through the **form** and *enter* the **required information** from **each selected option** from the **Access Required** section.
6. After you have entered all the required information, *enter* **your name** in the textbox at the end of the form and *click* the **submit button**.

What is Filebound

FileBound is a provider of digital solutions for document and workflow management. It offers a full document life cycle management solution, FileBound streamlines business processes through document imaging, records management, workflow automation, systems integration, and electronic forms capture.

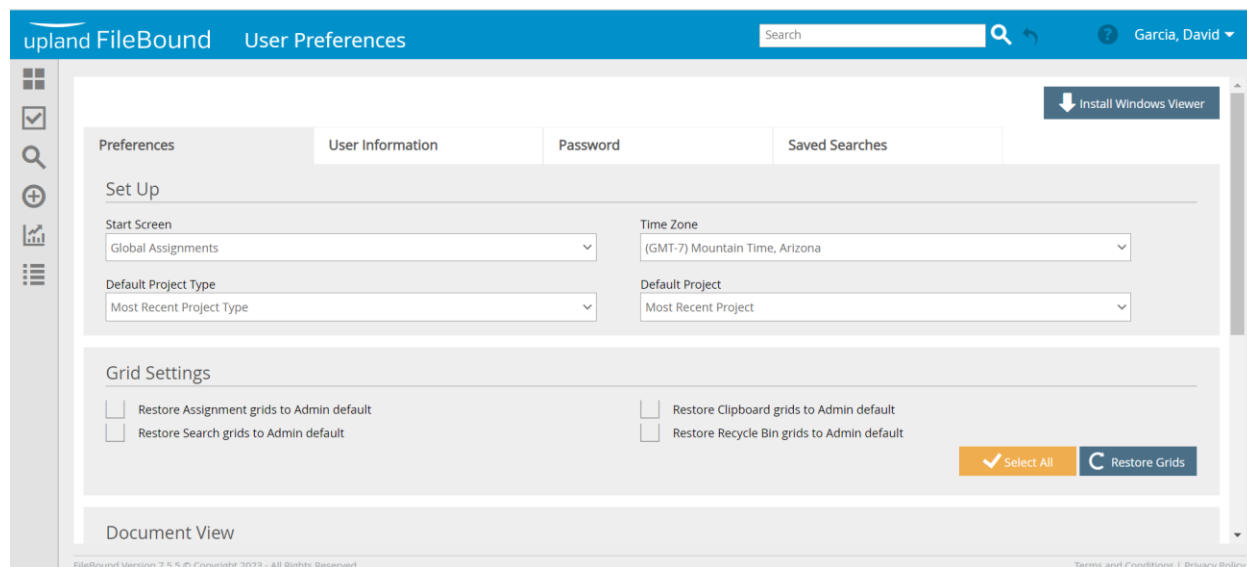
Currently, Filebound is being utilized by HR for document management. And, on the student side it used for tracking grants and the population for student's department. Nursing is using Filebound to track their students on how they are doing in the Nursing Program. And the staff are using Filebound to track employee files. Additional ways you might use Filebound is to track timesheets or invoices.

Logging into FileBound

Steps:

1. To access Filebound please enter <https://docimage.csupueblo.edu/> into your address bar. You are seeing the login screen because Filebound is Active Directory Authenticated.
2. Enter your **"NetID"** and **"Password"** to login.
3. Click the **"Login"** button to continue.

Setting User Preferences



Steps:

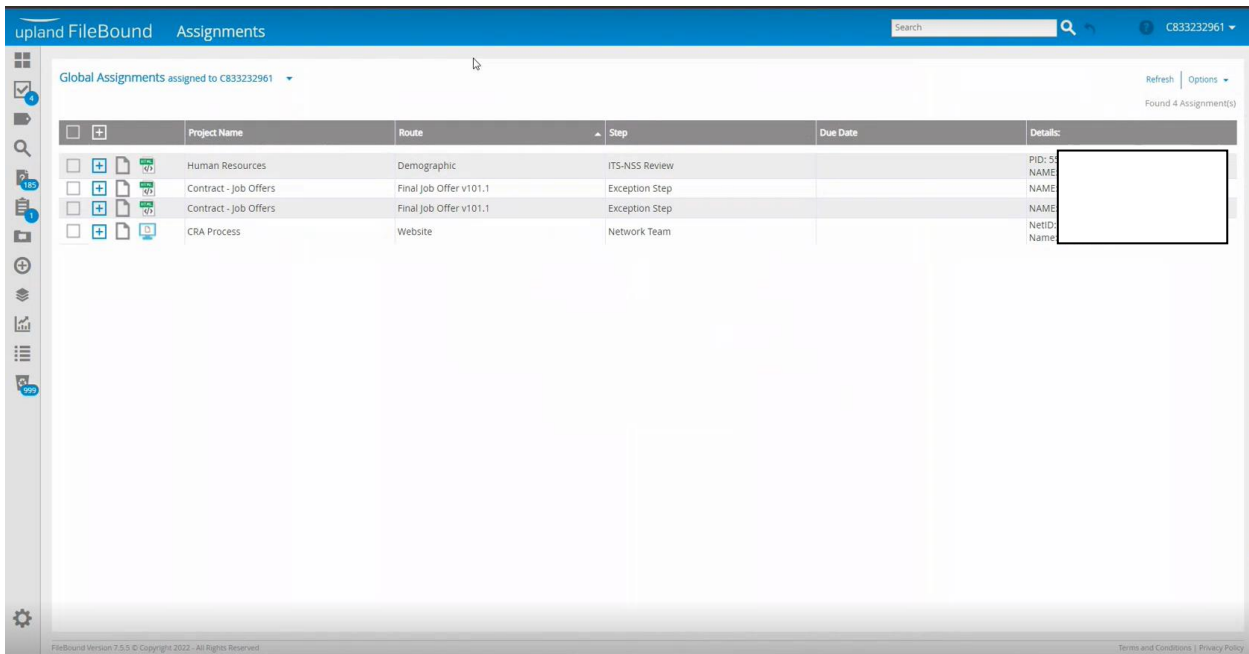
1. Click on your **"Name"** from the upper right-hand corner of the screen.
2. Choose the **"Preferences"** option from the drop-down menu.
3. As a Data or Approval Owner you may decide to use the Global Assignments for your Start Screen or if you are an IT Administrator that utilizes Filebound a-lot then you might want to select Project Search for your Start Screen. Click the **"Start Screen"** drop-down menu.
4. Select **"Global Assignments"** from the Start Screen drop-down menu.

5. Another option to beware of is the Default Project Type. The most common option defaults to the Most Recent Project Type. Click **“Most Recent Project Type”** option.

Note: However, you may want to change the Default Project Type to the CRA Process Report If you're always working with CRA projects or if you are frequently looking at the HR projects then you might want to select HR.

6. When you conduct a lot of searches in Filebound you will come across many different spreadsheet looking grids. You have the option of restoring the grid settings. Click the **“Restore Assignment grids to Admin default”** checkbox resets your columns.
7. Click the **“Restore Grids”** button.
8. Click the **“OK”** button.
9. There are two types of views in Filebound, the Web Viewer and the Windows Viewer. We recommend you always use the **Web Viewer** because the Window Viewer will be going away in the near future. Choose **“Web Viewer”** from the drop-down menu. Web Viewer should be set by default.
10. Click the **“Save”** button anytime you want to save a change.
11. Click the **“User Information”** tab. The User Information screen displays your account information. This information is getting pulled automatically from Active Directory. If you change the data here it will be overwritten nightly by the information in the Active Directory.
12. Click the **“Password”** tab. The Password screen allows you to change your Filebound password. It is **not** recommended to change since AD authenticated, Filebound is going to use the same password as what you use to log into your computer every morning.
13. Click the **“Saved Searches”** tab. Saved searches tab allows you to easily locate any saved searches. From this screen you can either edit the saved search, conduct a search based off the saved searches, or delete a saved search.

Filebound Assignments

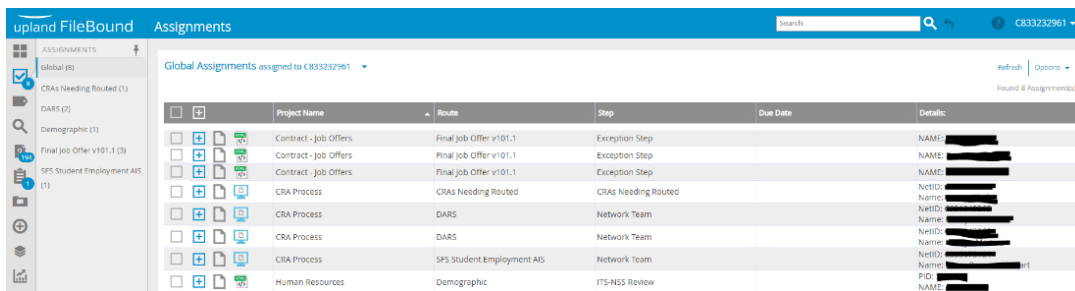


The screenshot shows the 'upland FileBound Assignments' interface. The top navigation bar includes a search bar and the user ID 'C833232961'. The main content area displays 'Global Assignments assigned to C833232961' with a table of assignments. The table has columns for Project Name, Route, Step, Due Date, and Details. The details column is expanded for the first row, showing fields like PID, SS, NAME, and NetID. A sidebar on the left contains various icons for navigation.

Project Name	Route	Step	Due Date	Details
Human Resources	Demographic	ITS-NSS Review		PID: SS NAME: [Redacted]
Contract - Job Offers	Final Job Offer v101.1	Exception Step		NAME: [Redacted]
Contract - Job Offers	Final Job Offer v101.1	Exception Step		NAME: [Redacted]
CRA Process	Website	Network Team		NetID: [Redacted] Name: [Redacted]

Steps:

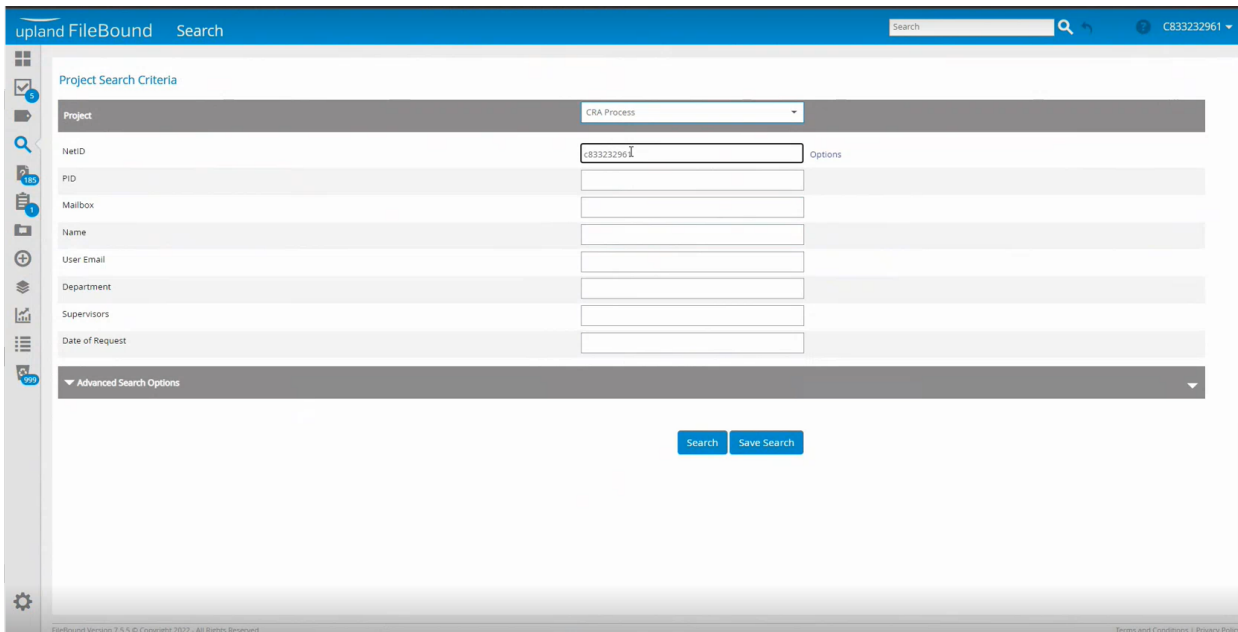
1. The **Assignments** tab will display all your assignments that you need to act on whether it is approving, rejecting, or cancelling an assignment. *Click* the **“Assignments”** icon.
2. The left-hand navigation displays the workflows for all your assignments. If you are over multiple projects, you'll see the corresponding workflows. *Clicking* on **“Global”** will show you all the Assignments in a single view.
3. *Click* on the individual assignments to narrow down the view.



This screenshot shows the same interface as the first one, but with a different set of assignments displayed. The left-hand navigation menu is expanded, showing various workflow categories like 'Global (8)', 'CRAs Needing Routed (1)', 'DARS (2)', 'Demographic (1)', 'Final Job Offer v101.1 (3)', and 'SPS Student Employment AIS (1)'. The main table shows a different set of assignments, including 'Contract - Job Offers', 'CRA Process', and 'Human Resources'. The details column is expanded for the first row, showing fields like NAME, NetID, and PID.

Project Name	Route	Step	Due Date	Details
Contract - Job Offers	Final Job Offer v101.1	Exception Step		NAME: [Redacted]
Contract - Job Offers	Final Job Offer v101.1	Exception Step		NAME: [Redacted]
Contract - Job Offers	Final Job Offer v101.1	Exception Step		NAME: [Redacted]
CRA Process	CRAs Needing Routed	CRAs Needing Routed		NetID: [Redacted] Name: [Redacted]
CRA Process	DARS	Network Team		NetID: [Redacted] Name: [Redacted]
CRA Process	DARS	Network Team		NetID: [Redacted] Name: [Redacted]
CRA Process	SPS Student Employment AIS	Network Team		NetID: [Redacted] Name: [Redacted]
Human Resources	Demographic	ITS-NSS Review		PID: [Redacted] NAME: [Redacted]

Conducting a Search in Filebound



Steps:

1. As a Data Owner/Supervisor you should have the ability to search for records. *Click* the **“Search”** icon to begin your search.
2. You can search for different projects using the Project Search screen. *Click* the **“Project”** drop-down menu.
3. *Select* **“CRA Process”** from the drop-down menu.
4. *Click* the **“Search”** button. The search results for the CRA page are now displayed.
5. You can narrow down your search by defining more search criteria utilizing the additional search fields. **Enter** your **“c123456789”** into the NETID field to search for all files that have been put in for you.
6. *Click* the **“Search”** button.
7. You can either select the correct Project you were looking for or edit the search further to narrow down your search results. *Click* the **“Edit Search”** link in the upper right-hand area of your screen.
8. The Department field is commonly used to narrow down the search results. *Enter* the correct Department you want to view.
Note: Notice on the Edit Search screen your previous search criteria is still displayed.
9. Once you have entered all your search criteria *click* the **“Search”** button.
Note: You can also save your search by clicking the **“Save Search”** button and naming your search.
10. If there is only one result that fits the search criteria Filebound displays the actual file with indexing fields loaded on top with documents below. When this search screen is displayed **no** changes to the data are needed nor should be changed on this screen since it is not search data

upland FileBound Search

Project: CRA Process

Name: ALAN BRUNING

User Email: alan.bruning@csupueblo.edu

PID: 447121

Date of Request: 11/18/2021

Department: TEST

Supervisors: alan.bruning@csupueblo.edu

NetID: C833232961

Mailbox:

Last Changed: 12/3/2021 9:52:00 AM

Changed By: C833232961

Workflow Activity: Current - Overdue - All - Incomplete

Documents Notes

Page	Document Name	Uploaded By	Date Uploaded	Last View
NO DIVIDER				
1	hellosign	Bruning, Alan D. Student Employee	7/31/2020 4:07:12 PM	5/19/2022 9:41:00 AM

- Return to the previous screen to conduct a new search. Click the **"Search"** icon on the left side
- The Edit Search screen also contains the option to conduct a more advanced search. You will need to expand the Advanced search options. Click the **"Advanced Search Options"** drop-down menu.
- The most common advanced search used includes Date Changed ranges. Enter the Dates into the field and click the **"Search"** button. Your Search results are displayed.

Viewing a File

upland FileBound Search

Project: CRA Process

4 items selected

Found 21 Files

	Name	User Email	PID	Date of Request	Department	Supervisors	NetID	Mailbox	File Change Date
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	04/01/2014	ITS		C833232961		11/13/2021
<input type="checkbox"/>	ALAN BRUNING		447121	05/05/2014	ITS		C833232961		5/5/2014
<input type="checkbox"/>	ALAN BRUNING		447121	07/07/2014	ITS		C833232961		7/7/2014
<input type="checkbox"/>	ALAN BRUNING		447121	07/11/2014	ITS		C833232961		7/11/2014
<input type="checkbox"/>	ALAN BRUNING		447121	07/21/2014	ITS		C833232961		7/21/2014
<input type="checkbox"/>	ALAN BRUNING		447121	10/20/2014	ITS		C833232961		10/20/2014
<input type="checkbox"/>	ALAN BRUNING		447121	02/04/2015	ITS		C833232961		2/4/2015
<input checked="" type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	04/17/2015	ITS	alan.bruning@csupueblo.e...	C833232961		10/26/2021
<input checked="" type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	12/04/2015	ITS	alan.bruning@csupueblo.e...	C833232961		3/23/2021
<input checked="" type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	12/11/2015	ITS	alan.bruning@csupueblo.e...	C833232961		7/7/2020
<input type="checkbox"/>	ALAN BRUNING		447121	03/10/2016	ITS		C833232961		3/10/2016
<input type="checkbox"/>	ALAN BRUNING		447121	5/31/2016	ITS		C833232961		5/31/2016
<input type="checkbox"/>	ALAN BRUNING		447121	08/11/2016	SR		C833232961		8/11/2016
<input type="checkbox"/>	ALAN BRUNING		447121	01/30/2017	ITS		C833232961		1/30/2017
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	05/08/2019	ITS	alan.bruning@csupueblo.e...	C833232961		5/8/2019
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	10/01/2019	ITS	howard.campbell@csupue...	C833232961		10/3/2019
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	11/08/2019	ITS	howard.campbell@csupue...	C833232961		11/8/2019

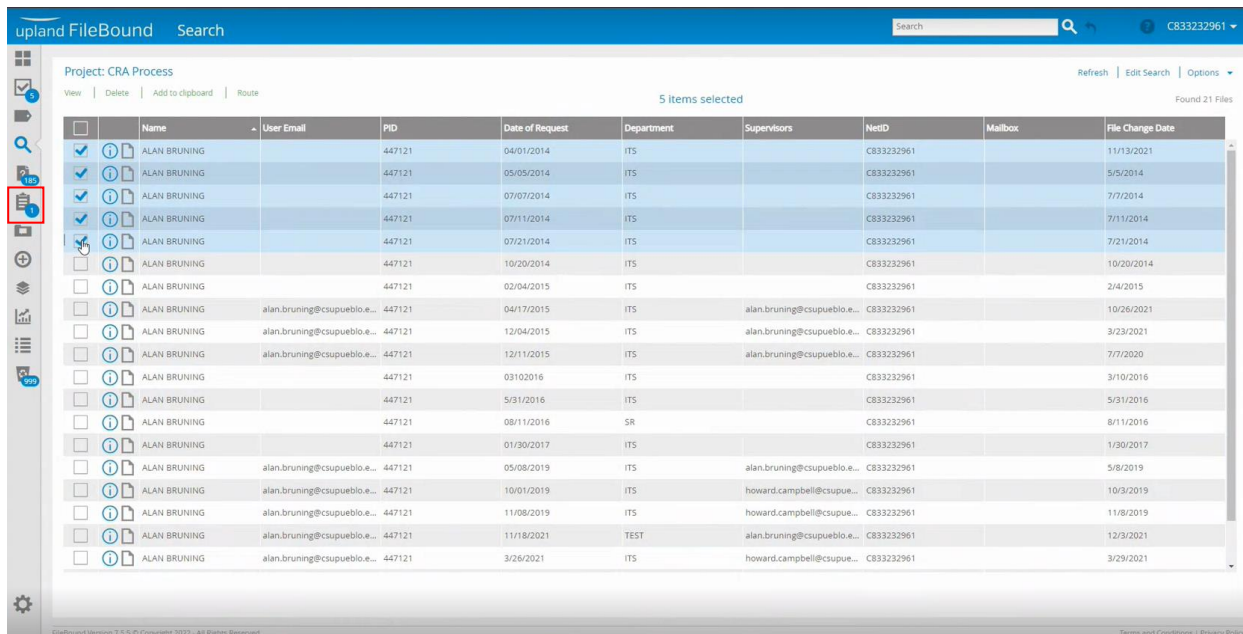
Steps:

- You can view one or multiple files by selecting the check box(s) in the first column. Click multiple **"check-boxes"** for the records you wish to see.
- Once you have selected the records click the **"View"** within the Project: CRA Process section.
- All the files you selected to view are now displayed in the viewer window in a cascaded format. You can close the folder tree by selecting the folders you wish to collapse. Click the top level **"Folder"** with the name of the person you are viewing the CRA Process for.

- The web viewer opened in another tab or window depending on your browser settings. A document that was electronically imported and attached to one of the projects should now be displayed.
- You can leave this tab open or close it to return to the list of Files. *Click* the “X” to close the tab.

Using the Clipboard

An example of using this function would be if an admin assistant submits 5 CRA's for their adjunct faculty and they want to keep an eye on those items. Having to click just one button to find all 5 of the files is much faster than trying to locate them using the search function.



Project: CRA Process

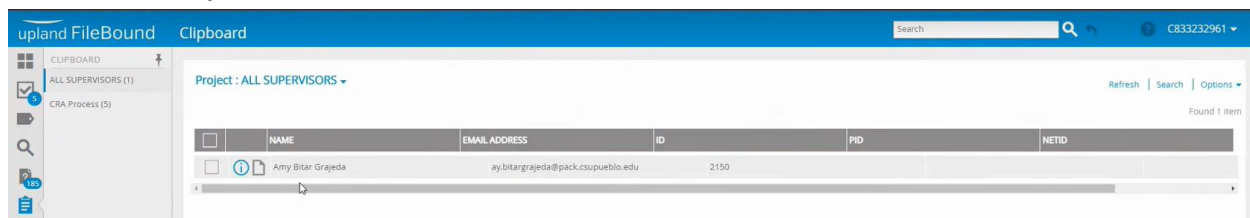
5 Items selected

	Name	User Email	PID	Date of Request	Department	Supervisors	NetID	Mailbox	File Change Date
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	04/01/2014	ITS		C833232961		11/13/2021
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	05/05/2014	ITS		C833232961		5/5/2014
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	07/07/2014	ITS		C833232961		7/7/2014
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	07/11/2014	ITS		C833232961		7/11/2014
<input checked="" type="checkbox"/>	ALAN BRUNING		447121	07/21/2014	ITS		C833232961		7/21/2014
<input type="checkbox"/>	ALAN BRUNING		447121	10/20/2014	ITS		C833232961		10/20/2014
<input type="checkbox"/>	ALAN BRUNING		447121	02/04/2015	ITS		C833232961		2/4/2015
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	04/17/2015	ITS	alan.bruning@csupueblo.e...	C833232961		10/26/2021
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	12/04/2015	ITS	alan.bruning@csupueblo.e...	C833232961		3/23/2021
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	12/11/2015	ITS	alan.bruning@csupueblo.e...	C833232961		7/7/2020
<input type="checkbox"/>	ALAN BRUNING		447121	03/10/2016	ITS		C833232961		3/10/2016
<input type="checkbox"/>	ALAN BRUNING		447121	5/31/2016	ITS		C833232961		5/31/2016
<input type="checkbox"/>	ALAN BRUNING		447121	08/11/2016	SR		C833232961		8/11/2016
<input type="checkbox"/>	ALAN BRUNING		447121	01/30/2017	ITS		C833232961		1/30/2017
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	05/08/2019	ITS	alan.bruning@csupueblo.e...	C833232961		5/8/2019
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	10/01/2019	ITS	howard.campbell@csupue...	C833232961		10/3/2019
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	11/08/2019	ITS	howard.campbell@csupue...	C833232961		11/8/2019
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	11/18/2021	TEST	alan.bruning@csupueblo.e...	C833232961		12/3/2021
<input type="checkbox"/>	ALAN BRUNING	alan.bruning@csupueblo.e...	447121	3/26/2021	ITS	howard.campbell@csupue...	C833232961		3/29/2021

Found 21 Files

Steps:

- Depending on the type of access you have will depends on what kind of options you see in this upper left-hand corner. As an Admin you can view or delete all the files or physically route them down an additional workflow. From the Search screen select a few more files. *Click* the “check box” for the files you wish to view.
- Click* the “Clipboard” icon on the left side of the navigation menu.
- The 5 files are now successfully moved to your clipboard where you can easily find and monitor those projects. *Click* the “OK” button.
- Click* the “Clipboard” icon to continue.



Project: ALL SUPERVISORS

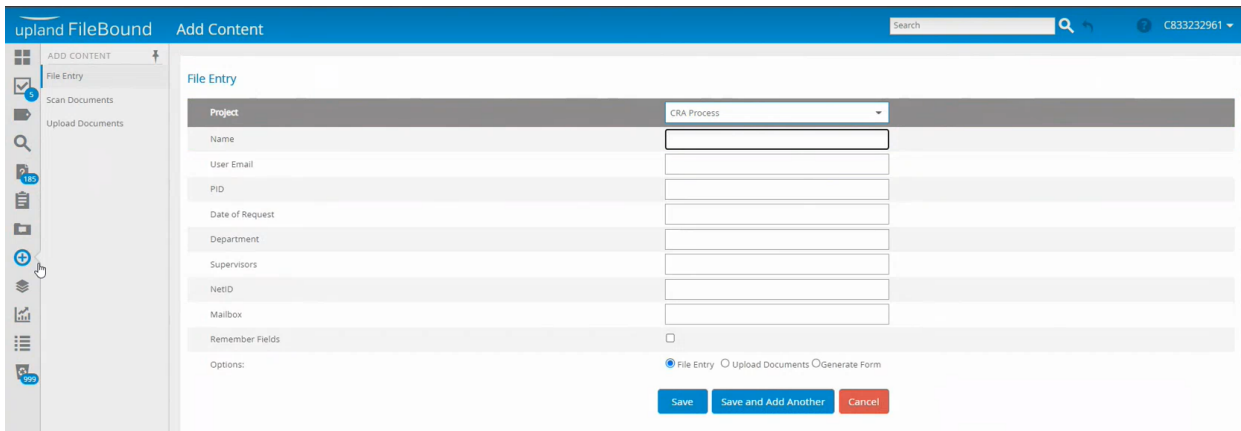
	NAME	EMAIL ADDRESS	ID	PID	NETID
<input type="checkbox"/>	Amy Bitar Grayda	ay.bitargrayda@pack.csupueblo.edu	2150		

Found 1 item

5. Now the Clipboard icon shows the files that were just added. To view those files, you will need to look in the clipboard.
6. You can remove the contents of your clipboard at any time without removing or deleting the files. Click the **“Remove From Clip Board”** link.

Adding Content

The add content function allows you to add different file types to your files. An example of this function is adding additional documentation like emails during the CRA Process for the user.

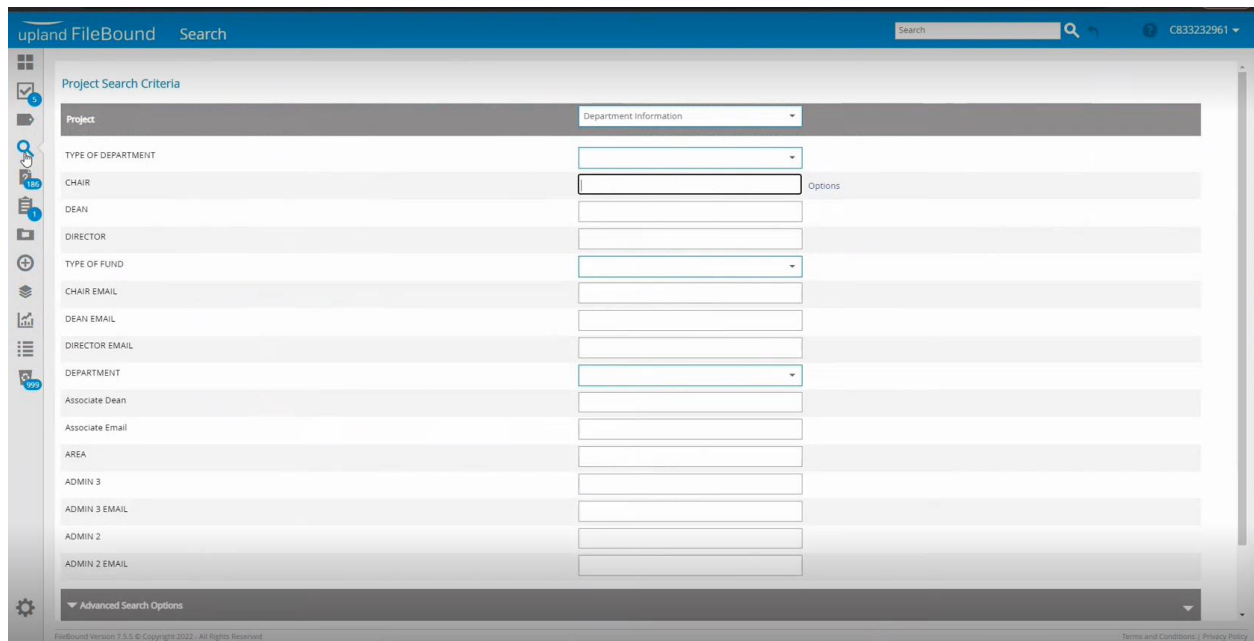


Steps:

1. The File Entry screen allows you to add or modify certain data elements to a file.
2. The Scan Document function is rarely used, but this function allows you to scan files into Filebound directly.
3. The most used function in the Add content screen is Upload Documents. Click **“Upload Documents”** link.
4. You can either drag and drop a file to upload or browser your computer. Click the **“Browse”** button.
5. The File Explorer window that houses all your documents on your computer should be displayed. Select the document you wish to upload. Once it has loaded click the **“File Now”** button.
6. Once the file is added to Filebound your next steps are to determine how you want the file indexed. Please populate the fields found under the Indexing section. Once you have completed the fields click the **“Save”** button. You have the option to upload to existing file or to a new file.

Additional Search Functions

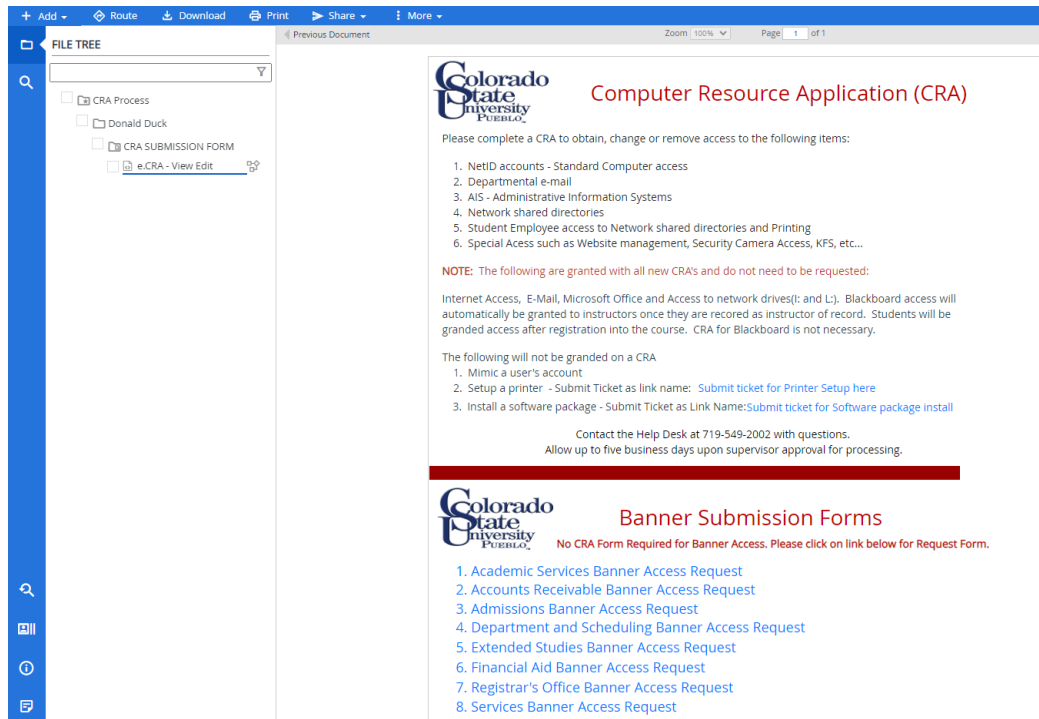
Our Computing Resource Application (CRA) is how CSU Pueblo faculty and staff request access to various resources or systems on campus.



The screenshot shows the 'upland FileBound Search' interface. At the top, there is a search bar and a user ID 'C833232961'. The main section is titled 'Project Search Criteria'. It contains a table with search criteria and input fields. The criteria include: Project (with a 'Department Information' dropdown), TYPE OF DEPARTMENT, CHAIR, DEAN, DIRECTOR, TYPE OF FUND, CHAIR EMAIL, DEAN EMAIL, DIRECTOR EMAIL, DEPARTMENT, Associate Dean, Associate Email, AREA, ADMIN 3, ADMIN 3 EMAIL, ADMIN 2, and ADMIN 2 EMAIL. Each criterion has a corresponding input field or dropdown menu. An 'Options' button is visible next to the CHAIR field. At the bottom, there is an 'Advanced Search Options' section with a dropdown arrow. The footer includes 'FileBound Search 3.5.0 Copyright 2021 - All Rights Reserved' and 'Terms and Conditions | Privacy Policy'.

Steps:

1. To begin you will need to conduct a search to locate the correct CRA Process. *Click* the **“Search”** icon.
2. To search for File in the CRA Process you will need to conduct a search. *Click* the **“Project”** drop-down menu to continue.
3. *Select* the **“CRA Process”** from the menu options.
4. *Enter* a NetID into the NetID field and any other search criteria needed to narrow down the results. *Click* the **“Search”** button
5. All the CRA Processes are now displayed based on your search criteria. Now, you will need to open one of the CRA Processes. *Click* the **“Paper”** icon to continue.

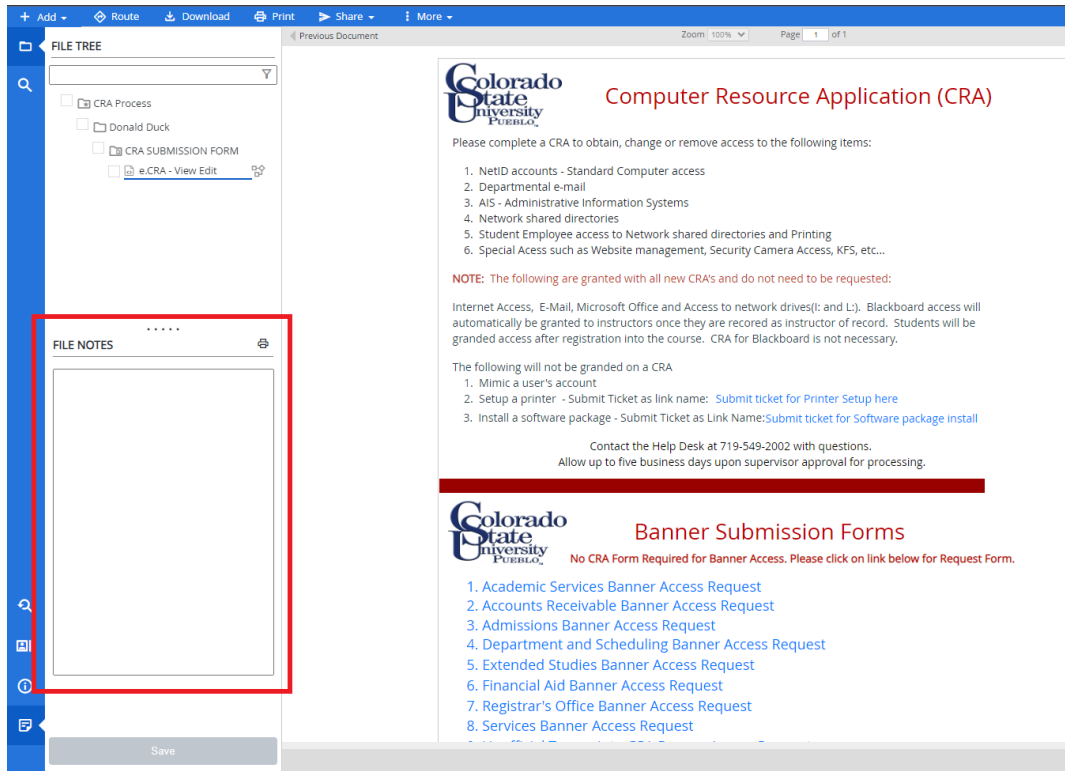


6. The left side navigation menu shows you the CRA process project. The top-level folder is the CRA Process Project. The second folder shows who the file is indexed for, and the embedded folder shows the contents of the uploaded file(s).
7. There are a few additional functions of Filebound which can be found on the lower left-side of the screen. *Click* the **“File Tree”** icon. The File Tree function provides additional ways to filter the File Tree folders found above.
8. *Click* the **“File Activity”** icon to continue.
9. The function allows you to see where the file has been or add comments to the files. *Click* the **“Filter: Showing File Comment”** drop-down menu.
10. The File Activity option is seldomly used as most notes comment are found within the documents. *Click* the **“File Details”** icon to continue.
11. The Files Details is frequently used to see the indexing information found within the project. To view more details, you can drag the File Details section up by clicking on the dots and dragging them up. *Click* the **“Dots”** to continue.
12. You can edit the File Details fields if needed. For example, this CRA process is listed under the wrong department.
13. The orange highlighted field means a change was made but has not been saved. Simply, edit the department and *click* the **“Save”** button.

Viewing File Notes and Document Properties

The File Notes section allows you to make comments or notes about the file, this is different than making a note on the document itself.

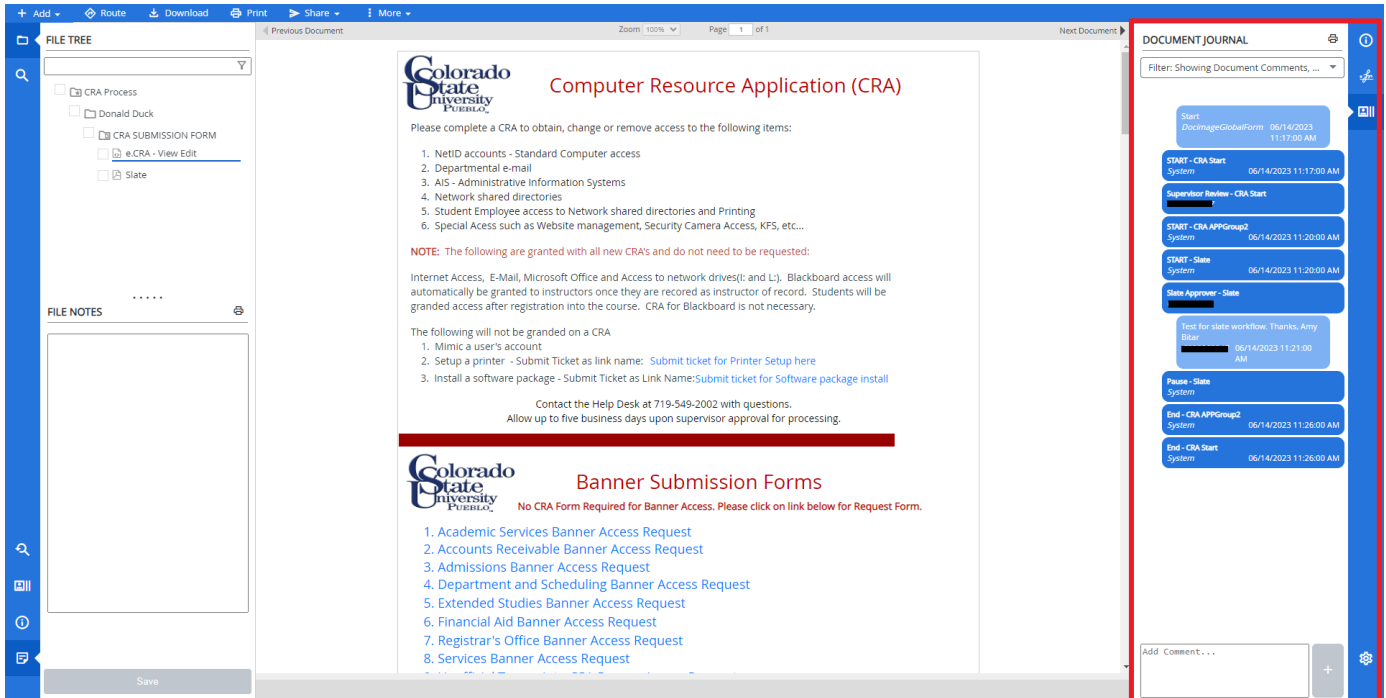
The document properties are displayed in the Document Information section. These are very helpful to a data owner.



Steps:

1. Click the **"File Notes"** icon.
2. If you decide to utilize the File Notes you will need to enter your note into the File note field and click the **"Save"** button to attach the note within the file.
3. The document properties are displayed in the Document Information section on the right-hand side of the screen.
4. The documents notes are a handy function. They allow you to make notes on the document itself vs what you saw earlier which allowed you to enter notes or comments on the file. Once you have entered your notes or comments click the **"Save"** button.
5. Once the comment was saved an exclamation point is added to the icon to let the users know there is a comment on the document. The exclamation point will always be there unless the comment is deleted.

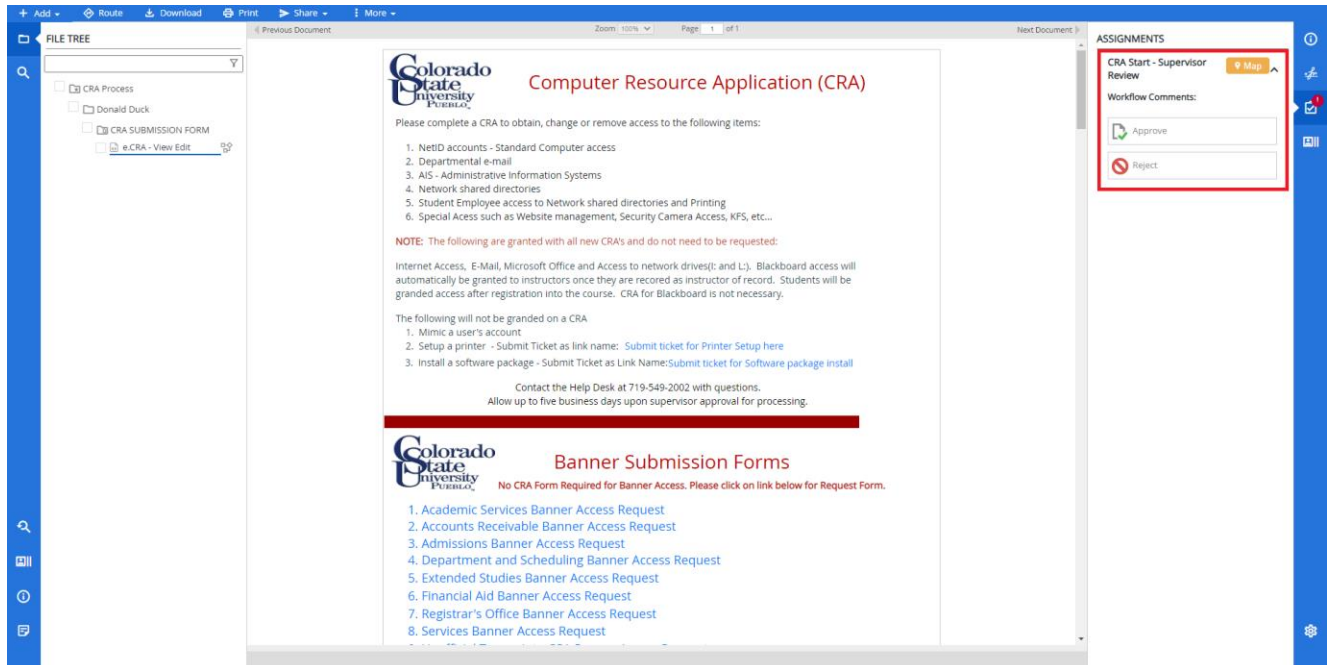
6. At this point there is no need to worry about the signatures. This is only needed if DocuSign was incorporated into this project.
7. Click **“Document Activity”** icon to continue



8. The Document Activity is the most important area as it will tell you the details of where the CRA has been routed.
9. The Filter function allows you to narrow down your views by either Activities, Comments, or Actions.
10. We want to view All activities, *click* the **“ALL”** option.
11. All activities are now displayed. This view will also show you how many times someone has edited or viewed a document.
12. The web viewer opened in another tab. You can leave this tab open or close it to return to the list of Files. *Click* the **“X”** to close the tab.
13. All the CRA Processes are now displayed based on your search criteria. Now, you will need to open one of the CRA Processes. *Click* the **“Paper”** icon to continue.
14. When a person approves a workflow, their comments will be added to this document journal along with any activity. This is useful as it shows where the document started down the workflow path and where it ended.
15. The web viewer opened in another tab. You can leave this tab open or close it to return to the list of Files. *Click* the **“X”** to close the tab.

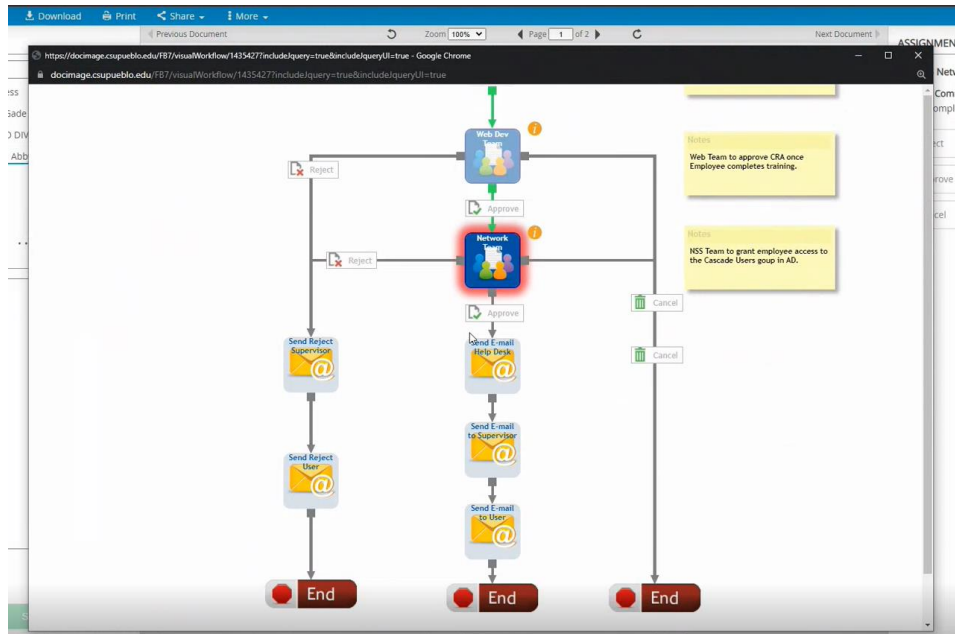
Viewing a CRA that needs approval

If you are a supervisor and or a data owner, you will be approving or rejecting documents in your queue. If you do not have anything to approve or reject, then this area will not be present.



Steps:

1. Click the **“Global Assignments”** icon to continue
2. Find the Assignment that is named CRA Process and *click* the **“Paper”** icon to open the document.
3. As a data owner If you have active workflows in your assignment then the workflow options icon will appear.
4. Since the workflow options are available to you, you now have another feature called Map. *Click* the **“Map”** icon to continue.



5. The Map function allows you to see where you are at within the CRA Process workflow. In this example you are the last approval needed before it goes to the end user.
6. Click the “X” to close the window.
7. This user completed the training on 12/15/2022 and this CRA Process is ready for approval. Click the “Approve” button.
8. Enter any notes or comments you want about the workflow action and then you are ready to save. This message will be sent to the help desk, the supervisor, and to the user since it is the last approval step in the list.
9. If it’s not the last person in the workflow or in the last assigning authority in the workflow, then you would see the notes in the Workflow comments. Click the “Save and Continue” button.
10. As a data owner you will see that the workflow has been taken out of your queue and now you only see three icons on the right-hand side.
11. Make sure you see the message that the workflow Operation is Completed before exiting out of this document. Click the “X” to continue.
12. You will need to refresh your screen to see that the Assignment has been removed. Click “Refresh” to update the Global Assignments view.
13. You have now successfully approved a CRA Process Form.