

eFolder Document Training Guide

Document training is the process of associating an eFolder file attachment with an eFolder document. After a file has been trained, future copies of the file attachment will be automatically assigned to the document when imported into the eFolder. The features listed below support document training in Encompass:

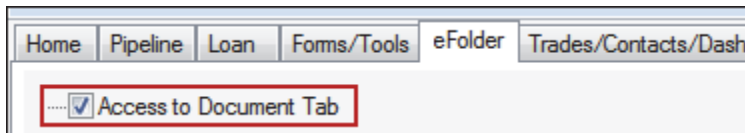
- Options in the Personas setting enable personas to submit or approve suggestions for document training.
- A **Training** button on the eFolder File Manager enables user to suggest documents for training.
- A **Document Training** setting has been created where training suggestions can be reviewed and approved. Approvers can also use this setting to submit their own suggestions for document training.

Personas Setting Options

Two options in the Personas setting control whether a persona can suggest or approve documents for training.

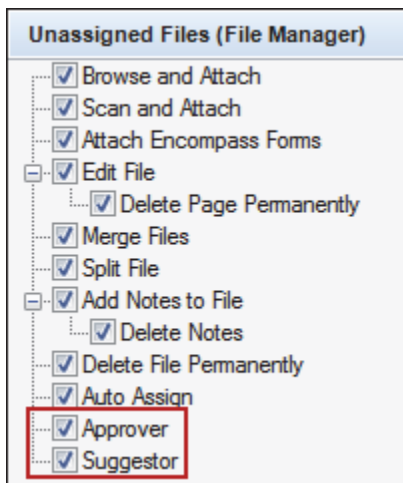
To Define Persona Access:

1. In Encompass Settings, click **Company/User Setup**, and then click **Personas**.
2. In the left panel, select a persona.
3. Click the **eFolder** tab.
4. Select the **Access to Document Tab** check box.



5. In the Unassigned Files (File Manager) section, select the **Suggestor** check box to grant permission to make suggestions from the eFolder File Manager.
6. Select the **Approver** check box to grant permission to approve or reject suggestions from the Document Training setting.

Note: Personas with Approver permissions can also make document training suggestions from the Document Training setting and from the eFolder File Manager.

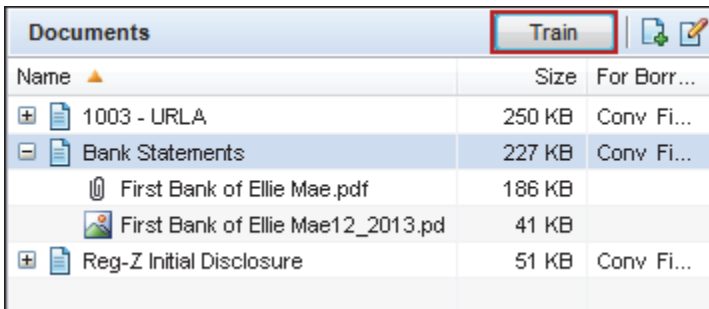


Suggest Files for Document Training

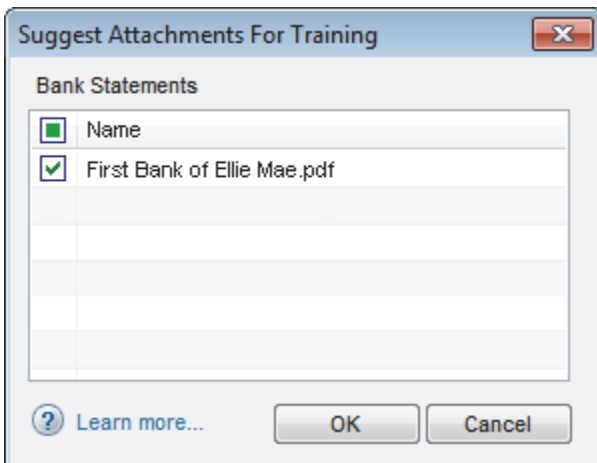
A **Train** button has been added to the eFolder File Manager to enable users to suggest a file for training. The suggestion is reviewed by an Encompass user who has been given the right to approve suggestions.

To Recommend Automatic Assignment for a File:

1. In the Encompass eFolder, click the **File Manager** button.
2. Drag a file from the Unassigned section to the Documents section, and then drop it on the document to which you want it assigned.
3. In the Documents section, select the document, and then click the **Train** button.



4. On the Suggest Attachments For Training window, select the check box for the file or files that you want to automatically assign to the document.



5. Click **OK**, and then click **OK** again when the confirmation message displays.

Approve Document Training Suggestions

Use the Document Training setting to approve or reject eFolder file attachments that will be automatically assigned to selected eFolder documents. Suggestions are submitted from the eFolder File Manager by Encompass users. The suggestions display in the Document Training setting, where a designated approver can approve or reject them. Approvers can also use the setting to submit and approve their own suggestions.

- When a suggestion is approved, the file is automatically assigned to the document the next time the file is imported into the eFolder.
- When a suggestion is rejected, the file is added to the Unassigned section of the eFolder File Manager.
- Approvers can delete the records for suggestions that are no longer needed.

To Approve or Reject a Suggestion:

1. On the menu bar, click **Encompass**, and then click **Settings**.
2. In the left panel, click **eFolder Setup**, and then click **Document Training**.
3. In the Documents section, select a document.
 - Documents in bold font have suggestions that are awaiting approval.

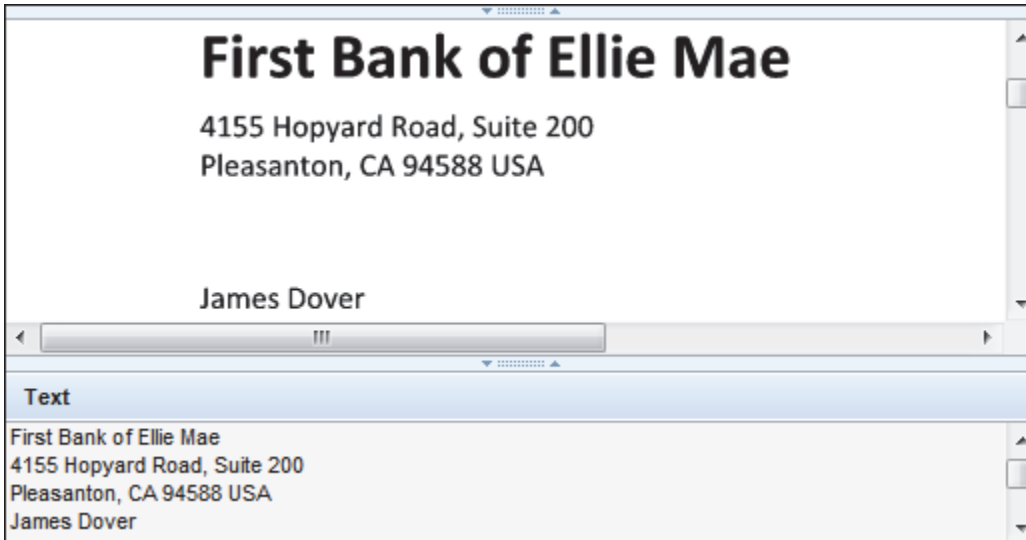
Document Training	
Train the document identification	
Documents	
Name ▲	
1003 - URLA	
1008 - Transmittal Summary	
Affiliated Business Disclosure	
Bank Statements	
Beta	
Good Faith Estimate	

4. The Templates section displays all suggestions that have been submitted for the selected document, including the following information:
 - **Status** - The status of the suggestion: Suggested, Approved, or Rejected.
 - **Status By** - The Encompass user who placed the suggestion in its current status. If the status is Suggested, this will be the user who submitted the suggestion.
 - **Status Date** - The date when the status was last changed. If the status is Suggested, this will be the date the suggestion was submitted.
 - **Suggested By** - The Encompass user who submitted the suggestion.
 - **Suggested Date** - The date when the suggestion was submitted.

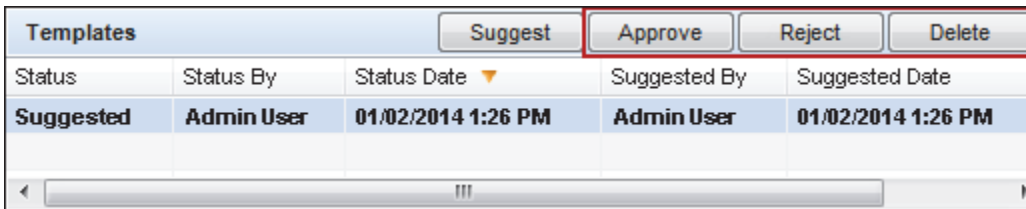
Templates					
		<input type="button" value="Suggest"/>	<input type="button" value="Approve"/>	<input type="button" value="Reject"/>	<input type="button" value="Delete"/>
Status	Status By	Status Date ▼	Suggested By	Suggested Date	
Suggested	Admin User	01/02/2014 1:26 PM	Admin User	01/02/2014 1:26 PM	

5. Select a suggestion in the Templates section.
 - Suggestions in bold font are awaiting approval.

- Use the viewing panel below the list to view the file.



- Use the Text panel to view the text in the file.
- After reviewing the file, click the **Approve** or **Reject** button to change the status.

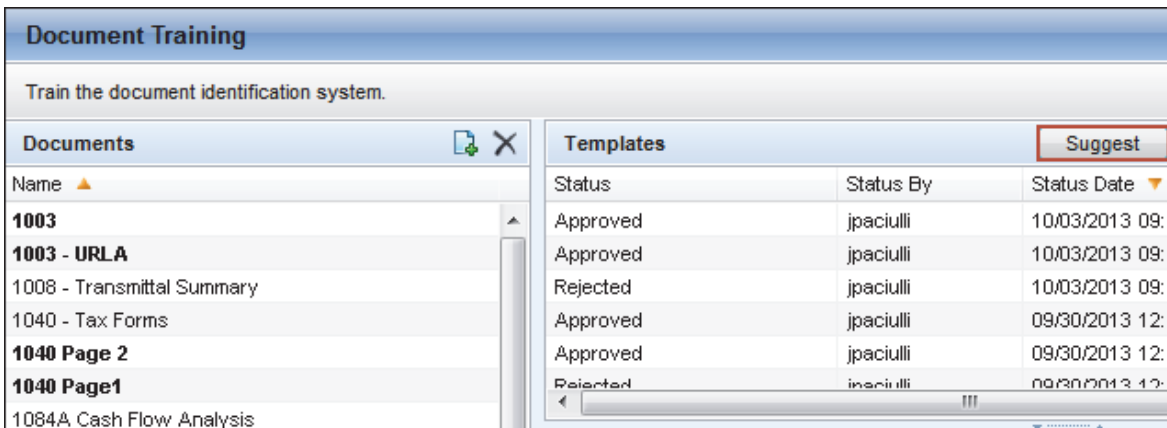


*NOTE: By default, only a user with the Super Administrator persona has permission to approve or reject suggestions. Users can be granted approver permission in the Personas settings by clicking the **eFolder** tab and then selecting the **Approver** check box in the Unassigned Files (File Manager) section.*

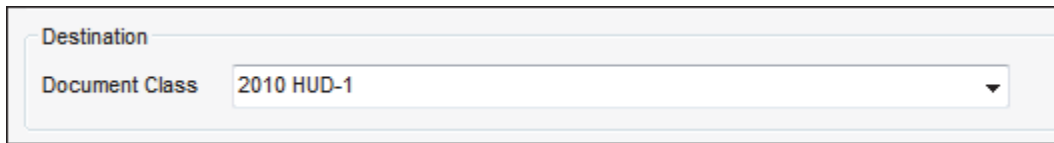
- To delete unwanted entries in the Templates section, select an entry and then click the **Delete** button.

To Add a Suggestion:

- To open the Suggest Training window and add a suggestion, click the **Suggest** button in the Templates section.
 - Or, select a document in the Documents section, and then click the **Suggest** button.

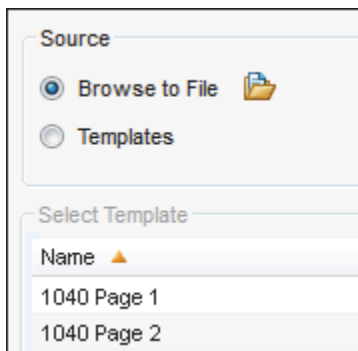


- In the Destination section, select the Document Class to which the file will be assigned.



The screenshot shows a window titled "Destination". Inside, there is a label "Document Class" followed by a dropdown menu. The dropdown menu is open, showing "2010 HUD-1" as the selected option. There is a small downward arrow on the right side of the dropdown box.

- If you selected a document before clicking the **Suggest** button, the Document Class field will already be populated with the document you selected.
- In the Source section, select **Browse to File**, and then click the **Folder** icon to select a file from your computer.



The screenshot shows a window titled "Source". At the top, there are two radio buttons: "Browse to File" (which is selected) and "Templates". To the right of "Browse to File" is a folder icon. Below this is a section titled "Select Template" which contains a list box. The list box has a "Name" label and a small upward arrow. The list contains two items: "1040 Page 1" and "1040 Page 2".

- Or, click **Templates**, select a template from the list, view the selected template file in the viewing area (the template text displays in the Text box), and then click **OK** when finished.
NOTE: When you select a file in the browsing window, the Suggest Training window will close and you will be returned to the Document Training setting.
- The suggestion displays in bold font in the Templates section on the Document Training setting with a status of **Suggested**.
 - For a document with multiple pages, each page displays as a separate entry.