



KEY FEATURES

In eFileCabinet Online 2016, the Menu Bar options include:

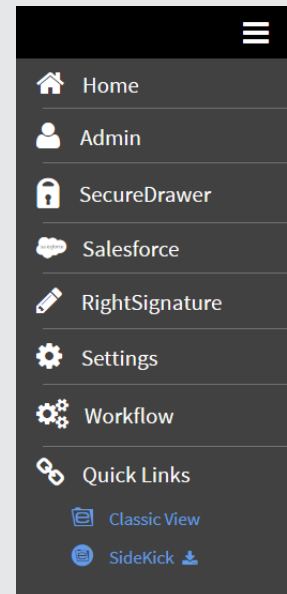
Main Menu, New, Share, Edit, More, Search, Settings, Help, and Uploads.

MAIN MENU

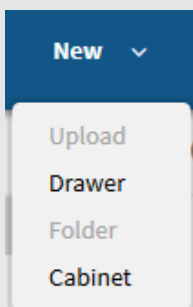
The Main Menu, represented by a hamburger icon, allows you to navigate eFileCabinet Online.

The Main Menu options include:

Home, Admin, SecureDrawer, SalesForce, RightSignature, Settings, Workflow, and Quick Links.

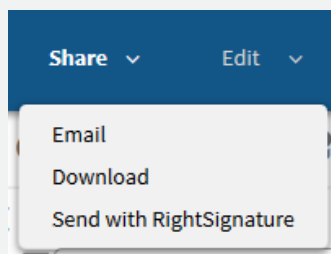


NEW MENU



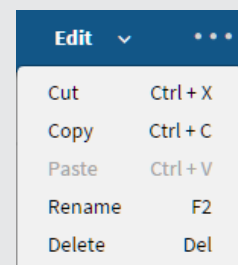
The New Menu allows you to add Cabinets, Drawers, Folders, and Files.

SHARE MENU



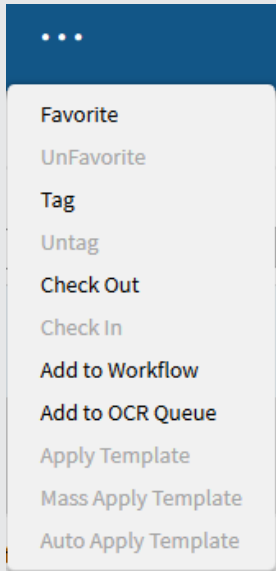
The Share Menu allows you to Email, Download, or Send Files with RightSignature.

EDIT MENU



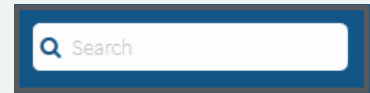
The Edit Menu allows you to Cut, Copy, Paste, Rename, or Delete a Drawer, Folder or File. In addition, you can Rename or Delete a Cabinet.

MORE MENU



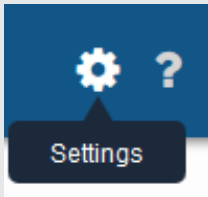
The More Menu, represented by an ellipsis icon, allows you to perform various actions on a Cabinet, Drawer, Folder, or File, including: Favorite, UnFavorite, Tag, Untag, Check Out, Check In, Add to Workflow, Add to OCR Queue, Apply Template, Mass Apply Template, and Auto Apply Template.

SEARCH BOX



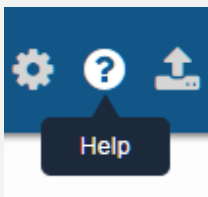
The Search box allows you to Search for the name of a Cabinet, Drawer, Folder, or File, or information in Profile Items.

SETTINGS MENU



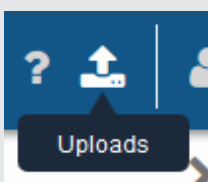
The Settings Menu, represented by a gear icon, allows you to manage your Personal and Account Settings. These same settings can be accessed from the Main Menu Settings option.

HELP MENU



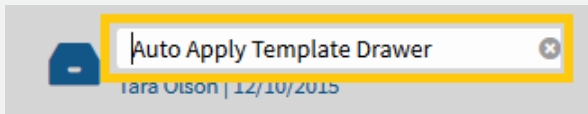
The Help Menu, represented by a question mark, gives you access to various Help options. If you click on the question mark, you will be taken to the eFileCabinet Support website.

UPLOADS MENU



The Uploads Menu, represented by a computer up arrow icon, allows you to view the Upload Queue, which is a list of any Files that have been recently Uploaded to eFileCabinet Online, and any Incomplete Uploads, which is a list of Files currently in the Upload process or Files that failed to Upload properly.

INLINE EDITING



In eFileCabinet Online, you have the ability to make inline edits.

HOVERING



In addition, there are several options when hovering over the name line of a Cabinet, Drawer, Folder, or File, including: Add Drawer, Add Folder, Add File, Delete, Copy, Cut, Email, and Download.

QUICK VIEW BAR

In eFileCabinet Online, the Quick View Bar allows you to filter and quickly view a list of specific Cabinets, Drawers, Folders, or Files. These options include:
Recents, Favorites, Tagged, Checked Out, Workflow, and Search.

The Recents Filter on the Quick View Bar, represented by a clock, allows you to filter eFileCabinet Online by your Recent activity. This is activity for the last 24 hours, including newly created structure and uploaded Files.



The Favorites Filter on the Quick View Bar, represented by a heart, allows you to filter eFileCabinet Online by the Cabinets, Drawers, Folders, or Files that you have marked as Favorites.



The Tagged Filter on the Quick View Bar, represented by a paperclip, allows you to filter eFileCabinet Online by Files that you have Tagged.



The Checked Out Filter on the Quick View Bar, represented by a lock, allows you to Filter eFileCabinet Online by the Files that you have Checked Out.



The Search Filter on the Quick View Bar, represented by a magnifying glass, allows you to do a New Search or to view your Saved Searches.



DETAILS MENU

In eFileCabinet Online, when a Cabinet, Drawer, Folder, or File is selected, the Details Menu allows you to perform various actions, including: Preview and Comments, Profile, Permission, Retention, SecureDrawer, Versions, and Audit Logs. In addition, the Details View is collapsible.



Preview and Comments on the Details Menu is represented by an eye. Preview allows you to perform various actions on a File in the Preview pane. Comments allows you to view, add, or edit comments for a Cabinet, Drawer, Folder, or File.



Profile on the Details Menu is represented by four lines. A Profile can be added to a Cabinet, Drawer, Folder, or File. Creating a Profile for items in eFileCabinet Online increases your ability to find those items in a search because a Profile adds searchable metadata to the selected Cabinet, Drawer, Folder, or File.



Permissions on the Details Menu is represented by two people. Permissions can be added to a Cabinet, Drawer, Folder, or File. Adding Permissions allows other users and groups to View, Edit, Delete, or Administer.



Retention on the Details Menu is represented by a shield. Retention settings can be added to a Cabinet, Drawer, Folder, or File. Adding Retention settings for items in eFileCabinet Online allows you to Retain the items for as long as necessary.



SecureDrawer on the Details Menu is represented by a lock. SecureDrawer gives you a protected way to share documents with others within a secure, encrypted portal.



Versions on the Details Menu is represented by two papers. Versions allows you to view the Versions information of a File, to upload a new Version of a File, and to set a previous Version of a File as the current Version.



Audit Logs on the Details Menu is represented by a clock with a circle arrow. Audit Logs allows you to view information for a selected Cabinet, Drawer, Folder, or File, which includes: Date and time, User, Category, Action, IP Address, and any system Notes.