

pVAULT[®] 2022.0

WHAT'S NEW



pVAULT[®]
ENTERPRISE CONTENT MANAGER

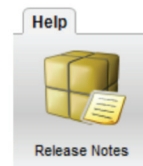
PaperlessEnvironments.com | 225-218-4768

pVAULT® 2022.0

WHAT'S NEW

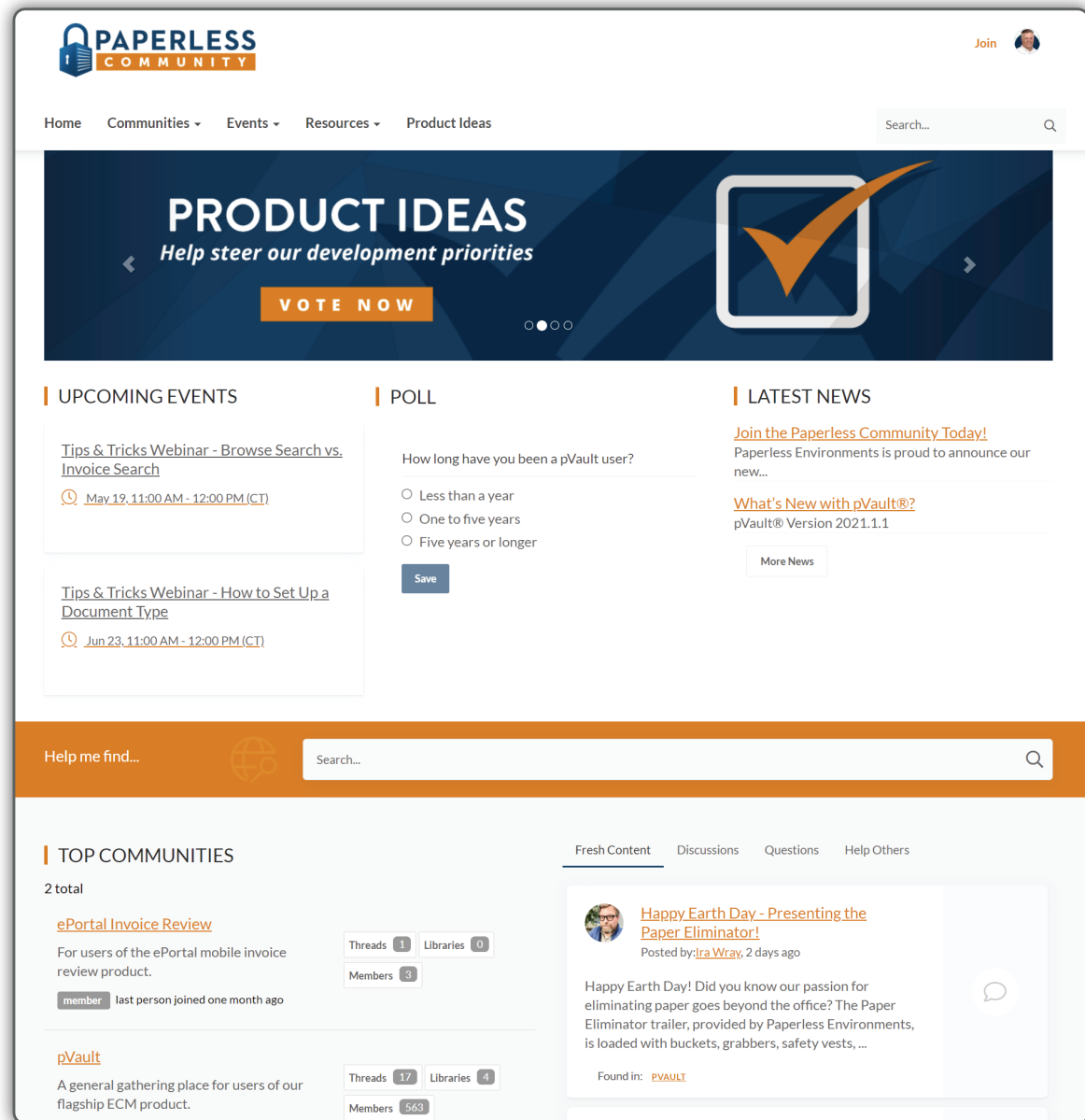
We are extremely excited to announce the first release of pVault® for 2022! This release includes all the best of our 2021 versions and takes it to the next level. We have listened to our customers, improved functionality, and added features as well as fixed bugs that were in the previous releases.

*For more details on feature additions and bug fixes, click the **Release Notes** button located on the **Help** menu.*



NEW! PAPERLESS COMMUNITY WEBSITE

With this year's release, we would like to introduce the new Paperless online community! Build your knowledge of Paperless offerings by joining Paperless U. Submit or vote on feature requests for the Paperless development team to work on. Or, simply hang out in the forums for company news or exciting release information.

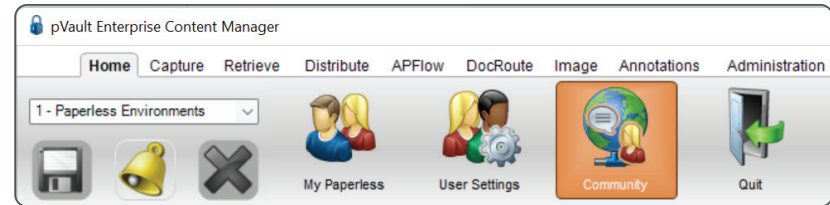


NEW! PAPERLESS COMMUNITY WEBSITE CONT.

MEMBERSHIP BENEFITS INCLUDE:

- Find best practices from your industry and beyond in our product forums, where users of pVault®, eForms™, eCapture™, and ePortal™ come to discuss and collaborate.
- Help guide future product development by submitting and voting on product ideas.
- Register for upcoming live webinars, where trainers present new and popular product features.
- Enroll in our all-new Paperless University, Paperless U, a self-paced learning center for beginners and long-time users alike.

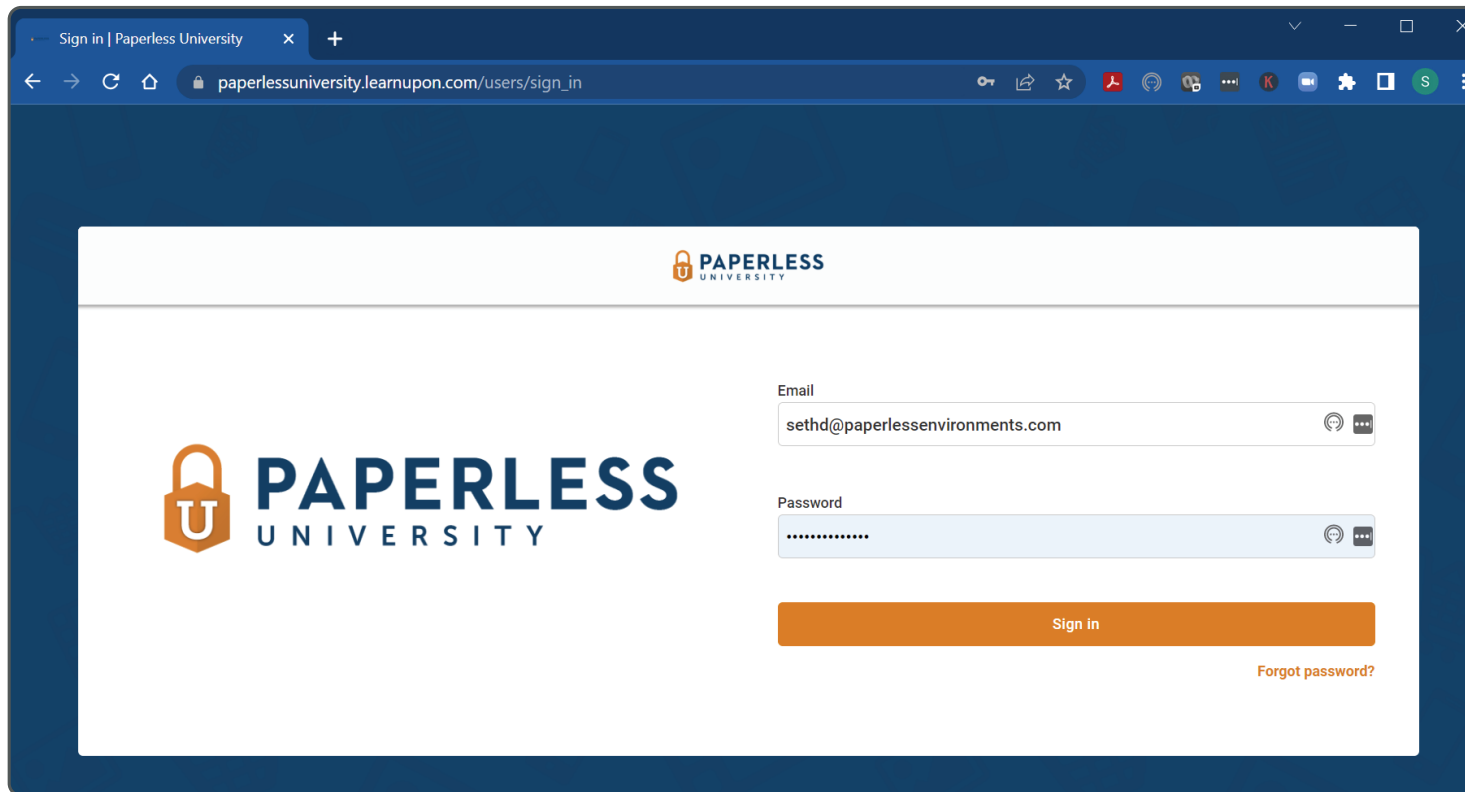
To learn more and become a member today, visit <https://community.paperlessenvironments.com/join> or click on the **Community** button located on the **Home** tab of pVault®.

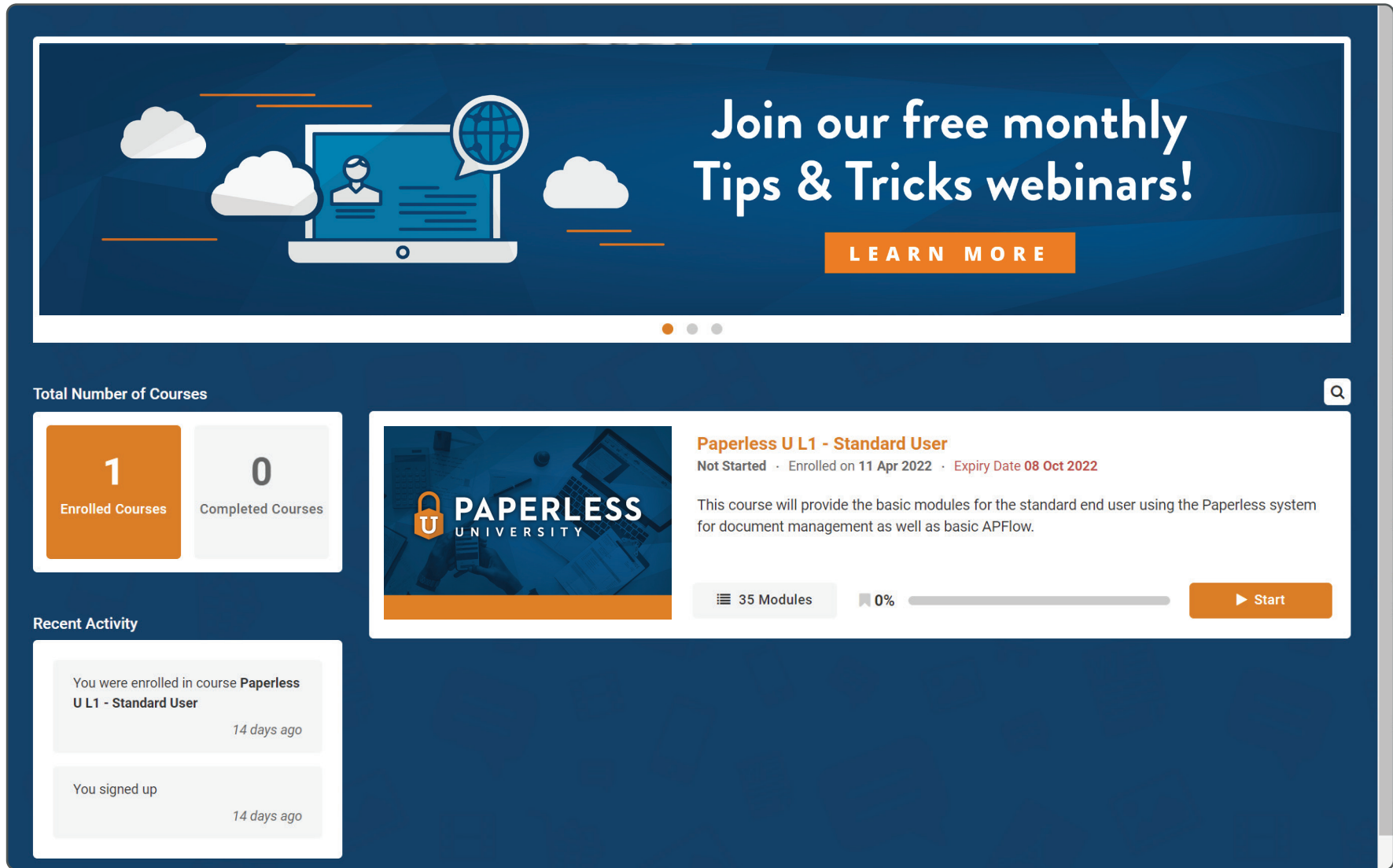


NEW! PAPERLESS UNIVERSITY



We are excited to announce our new online learning system Paperless U! Paperless University consists of courses that can help you get the most out of pVault®. By enrolling in Paperless U, you will learn how each module works and how it can best work for you. Put together by Paperless Environments® trainers, you can work your way through each course at your own pace. There are basic courses as well as advanced ones available. As you complete the coursework, you can earn badges and earn points toward Paperless U prizes. This is a great way to understand how pVault® works. Contact support to find out more.





The screenshot shows a user dashboard with a dark blue background. At the top is a banner for a webinar. Below it are two summary cards for course statistics. To the right is a course card for 'Paperless U L1 - Standard User'. At the bottom left is a 'Recent Activity' section.

Join our free monthly Tips & Tricks webinars!

[LEARN MORE](#)

Total Number of Courses

1 Enrolled Courses	0 Completed Courses
------------------------------	-------------------------------

Paperless U L1 - Standard User

Not Started · Enrolled on 11 Apr 2022 · Expiry Date 08 Oct 2022

This course will provide the basic modules for the standard end user using the Paperless system for document management as well as basic APFlow.

35 Modules | 0% | [Start](#)

Recent Activity

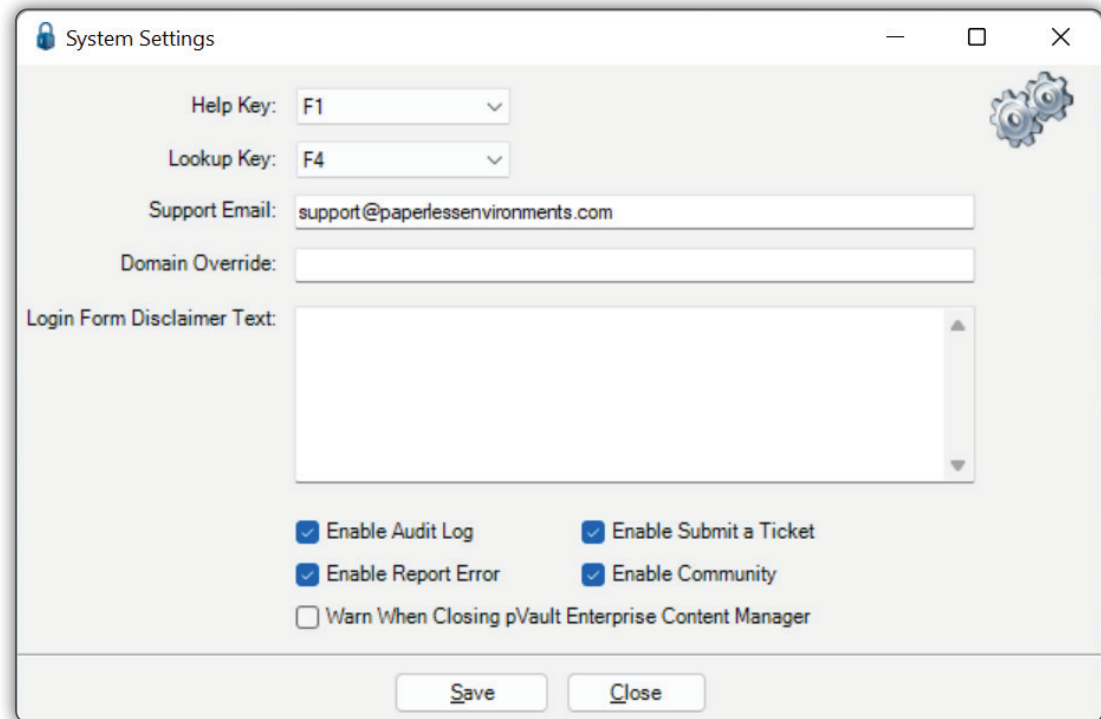
- You were enrolled in course **Paperless U L1 - Standard User** 14 days ago
- You signed up 14 days ago

CONTEXT SENSITIVE HELP

Help at your fingertips!

Click **F1** with your cursor on a toolbar icon, on a screen, or in a window to systematically open the online help to read more about the layout, a specific feature, or a particular function. You can still click **Help** in the ribbon toolbar to access the entire online help. With **F1**, you can quickly access a specific area of help when you need additional information.

System Administrators can change the default Help Key on the Administration -> System Settings screen as shown to the right.



The screenshot shows the 'System Settings' window with the following configuration:

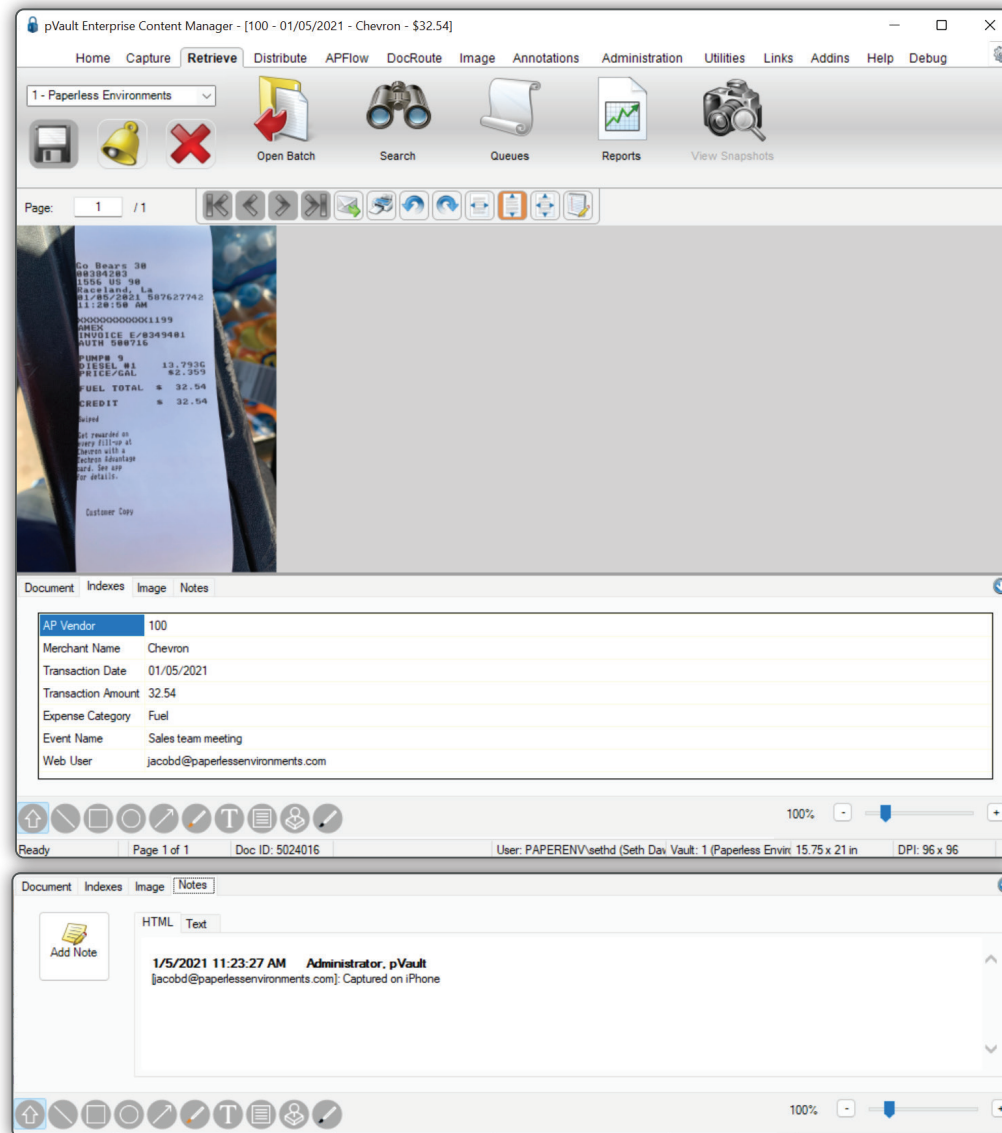
- Help Key: F1
- Lookup Key: F4
- Support Email: support@paperlessenvironments.com
- Domain Override: (empty)
- Login Form Disclaimer Text: (empty text area)
- Enable Audit Log:
- Enable Report Error:
- Warn When Closing pVault Enterprise Content Manager:
- Enable Submit a Ticket:
- Enable Community:

Buttons at the bottom: Save, Close

DOCUMENT INFO TRAY

Check out the new **Document Info Tray** that has been added to all main views in the program when you have a document open. This info tray allows you to quickly add notes or view index values with the same information that is listed using the **Document Info** button on the **Utilities** ribbon toolbar.

You can keep it open, enlarge it, make it smaller, or close it. pVault® remembers the settings, so you do not have to. Move through the tabs to view information about the document you have opened.



OVERRIDE INDEX TYPE LOOKUPS

We have added the ability to override the default index type lookups on a vault by vault basis. This is helpful when a customer has multiple vaults and desires to have a different lookup from one vault to another.

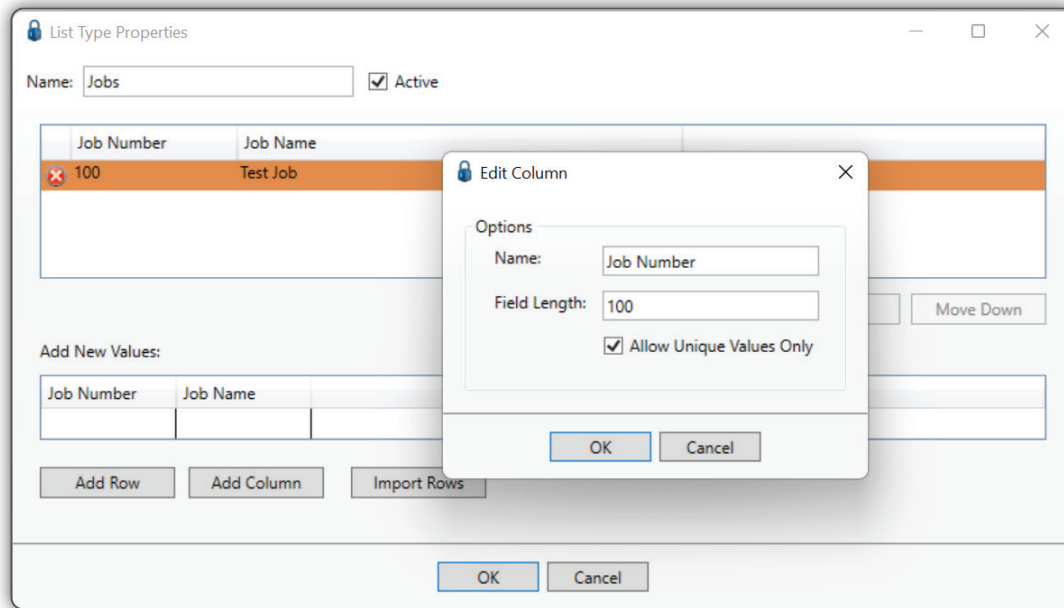
Administrators can choose another Bridged List, an internal user-defined list, or a query list to serve as the “override” for the configured vault.

The screenshot shows the 'Index Type Properties' dialog box with two tabs: 'Properties' and 'Document Types'. The 'Properties' tab is active. The dialog contains the following fields and controls:

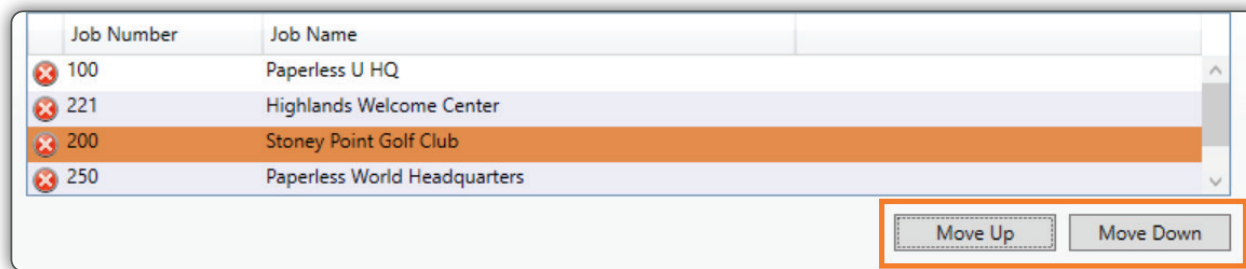
- Name:** Job Number (text input)
- Description:** Job Number (text input)
- Active:** Active (checkbox)
- Default Index Type Lookup:**
 - List Type:** Bridged List (dropdown)
 - List Name:** JobList (dropdown)
 - Return Column:** JobNumber (dropdown)
 - Buttons:** Configure List Types, Configure Query
- Override Index Type Lookup (For Current Vault Only):** (highlighted with an orange border)
 - List Type:** List (dropdown)
 - List Name:** Jobs (dropdown)
 - Return Column:** Job Number (dropdown)
 - Buttons:** Clear Override, Preview Override Lookup
- Validate As:** Text (dropdown)
- Max Length:** 200 (spin box)
- Alignment:** Left (dropdown)
- Padding Character:**
 - No Padding
 - (Leave blank for space)
 - Display as Currency
- Buttons:** OK, Cancel

PAPERLESS LIST ADDITIONS

We continue to enhance the pVault® user-defined list functionality in this newest release. You can now restrict columns to allow unique values only to ensure data integrity.



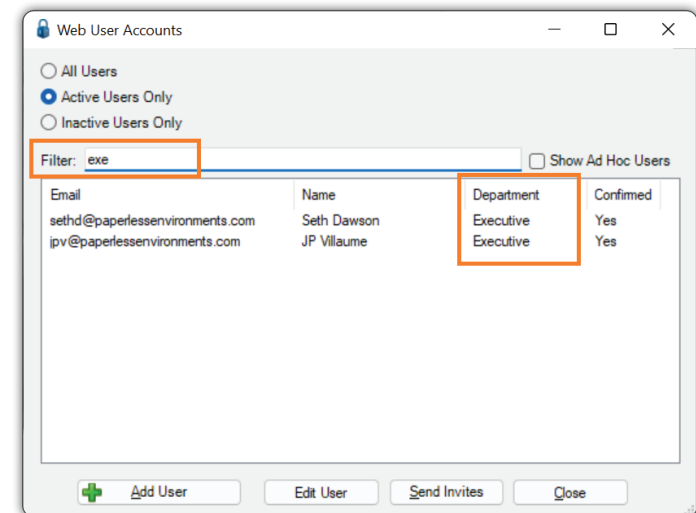
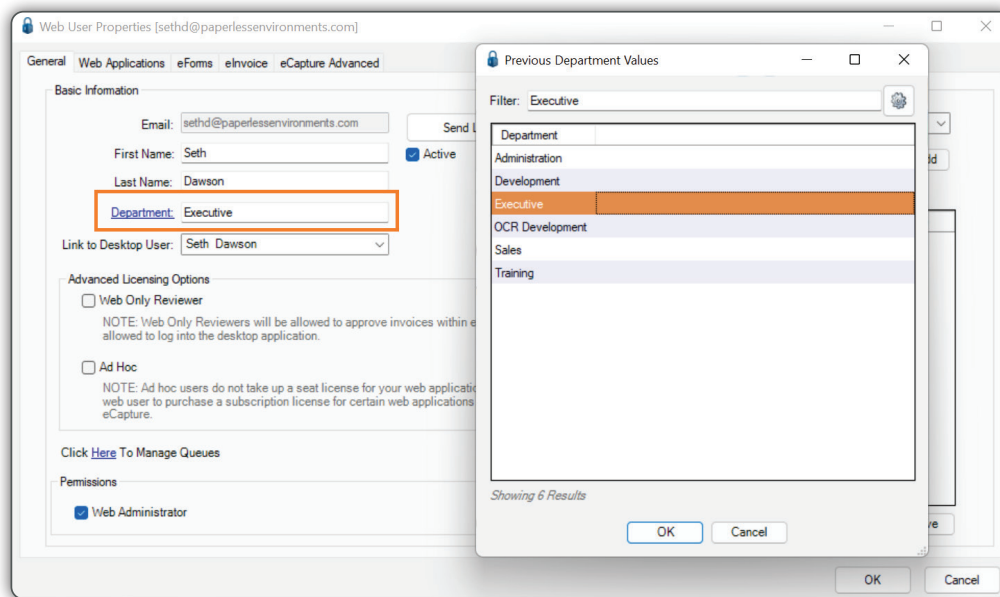
You can also organize your lists by reordering values.



WEB USER DEPARTMENT FIELD

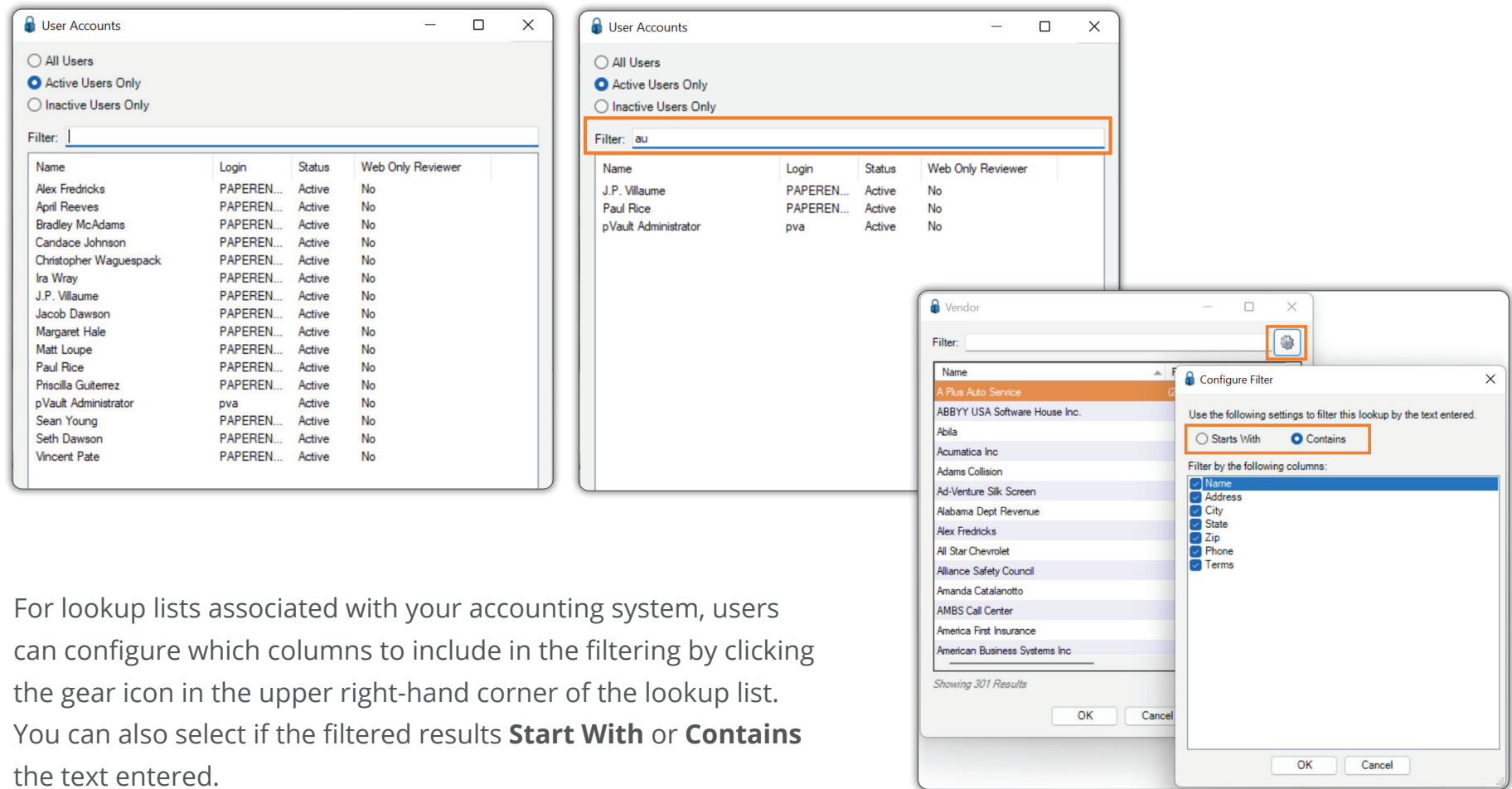
A new **Department** field has been added to the Web User Properties screen to allow you to classify your pVault® web users any way you want. To add a department, enter it in the **Department** field. To check out values that were added previously, click the **Department** field label to display the **Previous Department Values** dialog box or simply click your lookup key in the **Department** field.

Use this field to filter your Web User lookup list as shown below.



ADMINISTRATIVE LIST FILTERING

A new **Filter** field allows you to *instantly* filter the lookup list rather than having to scroll through lengthy lists to find the value you are looking for. The filtering occurs across all columns of the list to find your value in any column.



For lookup lists associated with your accounting system, users can configure which columns to include in the filtering by clicking the gear icon in the upper right-hand corner of the lookup list. You can also select if the filtered results **Start With** or **Contains** the text entered.

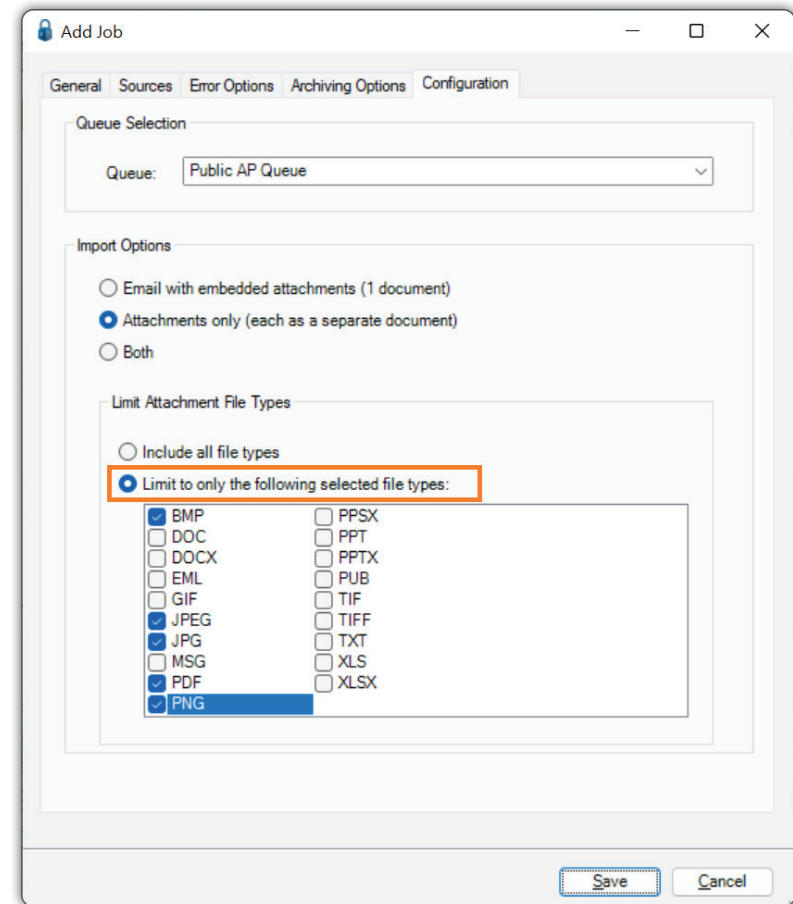
EMAIL IMPORTER ENHANCEMENTS

FILTER OUT FILE TYPES

The Importer **Email Import** job for both Outlook and Gmail now includes the functionality to systematically exclude file types. This configuration will help you target the types of documents your email importer is looking for and weed out email signatures that may also be found on any incoming emails.

REASSIGN EMAIL ACCOUNTS FOR USERS THAT HAVE LEFT THE COMPANY

For security, email importer job configurations restrict access to configured inboxes to the job creator. By adding *Email Owners* to your import configuration, email addresses “owned” by a user who is no longer an employee can be easily reassigned to another individual or group.



CUSTOM APFLOW™ VAULTS

In the past, a pre-programmed APFlow™ module had to exist to integrate APFlow™ into your internal accounting system. If you are in a situation where you have an additional ERP system that you would like to use the APFlow™ routing system with, yet there is no built-in integration, you are now in luck. You can now build your own custom APFlow™ vault. Add line types and fields to build your forms. Set up validation rules and calculation rules to build your workflow. Manage your lookups for vendors, GL accounts, etc., by using the built-in Paperless User Defined lists, or if you have ODBC or SQL connectivity to your ERP system, set up Query lists to display “live” data from your backend accounting system. Then use the CSV exporter to export your approved invoice data and import it into your accounting system. Your new vault can be as simple as header-only or contain up to forty different line types. Custom APFlow™ vaults also work with our Credit Card Importer, Invoice Manager, Invoice Entry, and Invoice Approval Modules.

ADD A CUSTOM LINE TYPE

Configure Invoice Entry Fields [Admin Mode]

You are currently editing invoice entry settings for all users.

Line Type: Show Hidden Fields

Preview - Click or tab into the field you would like to configure.

Field Properties

Source: Subcontract

Display Text:

Is Tab Stop:

Hide:

Input Width:

Allow Processor Edit:

Allow Reviewer Edit:

When to Require:

Max Length: 20

All Field Options

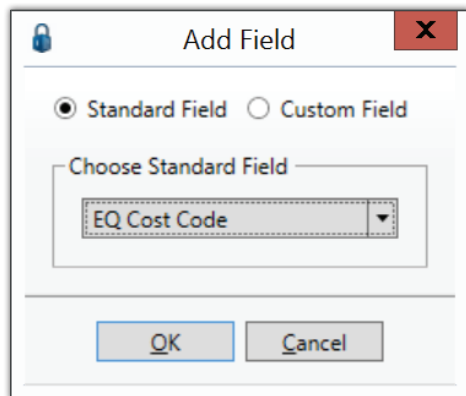
Custom Field Options

CUSTOM APFLOW™ VAULTS CONT.

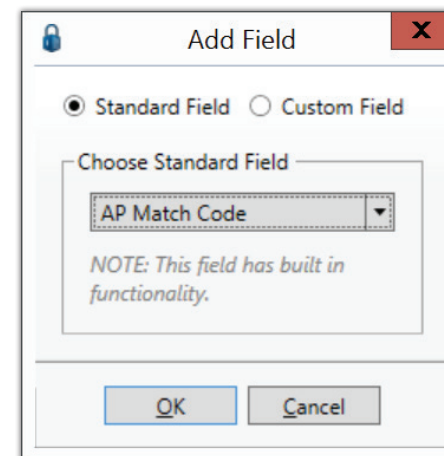
ADD STANDARD FIELD

The **Add Field** functionality has been expanded to allow you to add custom and standard fields. Standard fields are available **only** in a Custom APFlow™ vault. Standard fields save directly into our internal invoice tables so you can write your own reports against our tables.

When adding a standard field:



Some standard fields, such as AP Match Code or Field PO, come with build-in functionality found in our direct integrations.




ALLOCATION RULES

We have added the ability to set up **Expense Allocation Rules** whereby % based or \$ based allocations can be applied based on entered invoice header values. This will allow you to set up allocations that are for a specific vendor or vendors. In the rule, apply one allocation or multiple. This will save time for processors who have to remember which allocations get applied when.

Invoice Allocation Rule Properties

Name: Paperless Utilities Active

Description: Allocation Rules for Utility Bills

	Field Type	Invoice Columns	Operation	Value
	Header	Vendor	=	Entergy

Allocations:

Name
Utilities

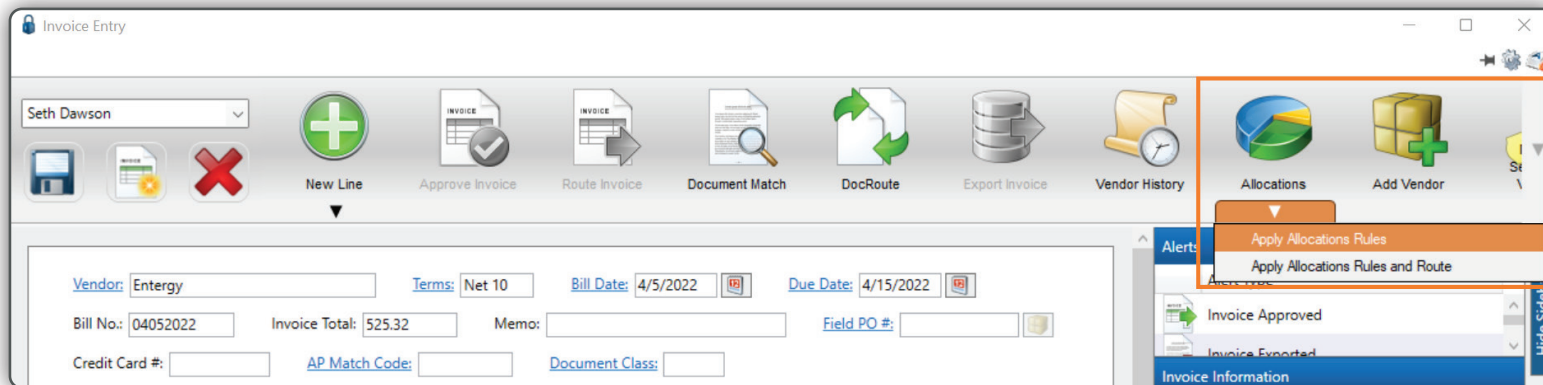
Adds additional criteria for AP Match Code Adds alternate Invoice criteria for AP Match Code

Rule Text:

{Vendor} = 'Entergy'

ALLOCATION RULES CONT.

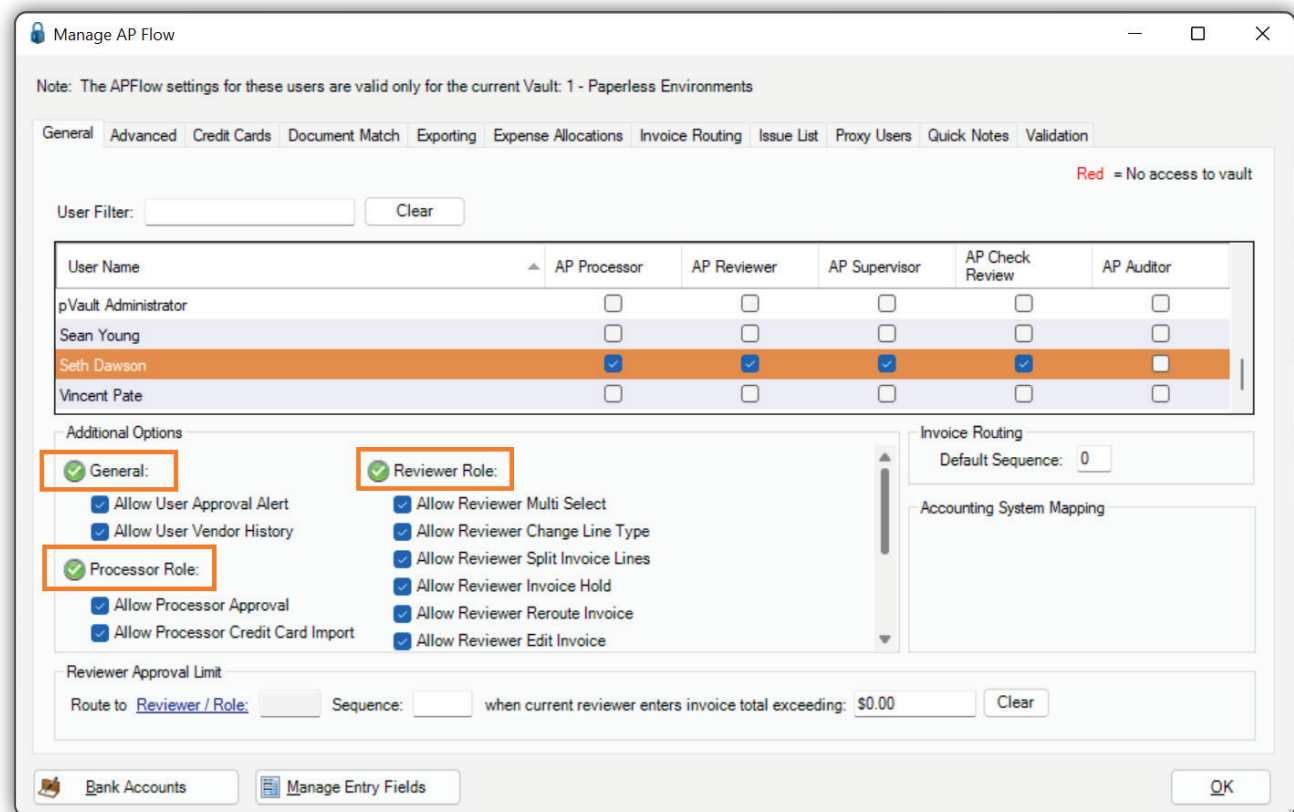
When entering a new invoice, processors can now choose **Apply Allocation Rules**, which will apply any applicable rules to the current invoice. In this case, the results will be shown to the processor immediately. For a more powerful option, the processor can choose **Apply Allocation Rules and Route**. In this case, applicable allocation rules will be applied, and if the invoice is fully allocated and reviewers are assigned to the invoice, it will instantly be routed to the reviewer(s), and the processor will begin entering the next invoice.



EASE OF USE ENHANCEMENTS

QUICKLY CONFIGURE APFLOW™ USERS BY ROLE

Want to give users of a particular role all available permissions? Quickly select all options by clicking the green checkmark in each available section.

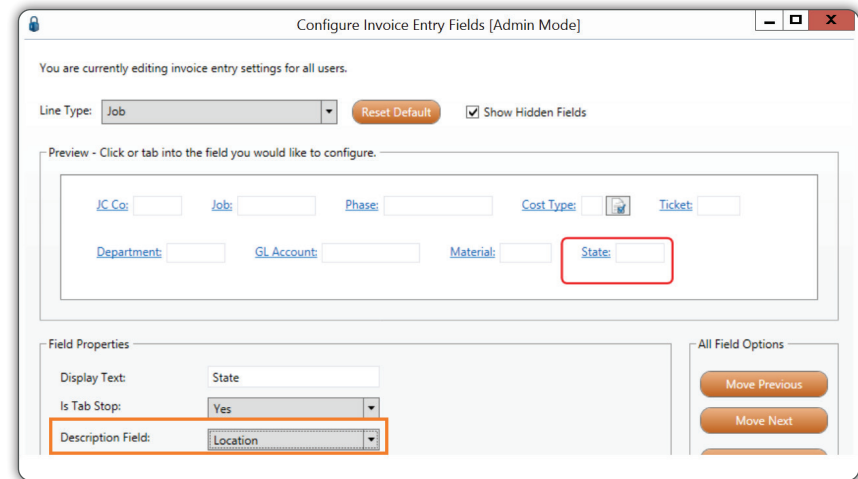


CONFIGURE INVOICE ENTRY FIELDS (ADMIN MODE)

Additional options for configuring entry fields have been added on the **Manage Entry Fields** screen! Administrators can now create calculations for fields, set descriptions on custom fields, and configure lookups for fields based on Paperless lists, Query Lists, and Index Types. We also allow list and Query List configuration directly on the **Configure Invoice Entry Fields** dialog.

SET DESCRIPTIONS ON FIELDS

Select which column of a lookup list will be displayed as the description shown under the input field.



CONFIGURE INVOICE ENTRY FIELDS (ADMIN MODE) CONT.

SET LOOKUPS ON FIELDS

Quickly Add Paperless Lists, Query Lists, and Index Types on the fly. Then tie it directly to your newly added custom fields.



The screenshot shows two overlapping windows from the pVault software. The background window is titled "Configure Invoice Entry Fields [Admin Mode]". It features a "Preview" section with a form containing fields for "JC Co:", "Job:", "Phase:", "Cost Type:", "Department:", "GL Account:", "Material:", and "State:". The "State" field is highlighted with a red box. Below the preview is a "Field Properties" section with various settings like "Display Text", "Is Tab Stop", "Description Field", "Input Width", "Format Text To", "Allow Processor Edit", "Allow Reviewer Edit", "When to Require", and "Max Length". At the bottom, there is a "Lookup Info" section showing "List Type: List", "List Name: States", and "Return Column: State".

The foreground window is titled "Configure Lookup". It has three radio buttons: "Use a List" (selected), "Use a Query", and "Use an Index Type". Below these are options for "List Type" (set to "States"), "Return Column" (set to "State"), and "Name" (set to "States"). A table lists states with checkboxes: AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, and GA. At the bottom, there are "Add Row", "Add Column", and "Import Rows" buttons.

CONFIGURE INVOICE ENTRY FIELDS (ADMIN MODE) CONT.

Once your lookups are in place, you can now quickly identify which fields are tied to lookup configuration and preview lookup data directly on **Configure Invoice Entry Fields**.

List Type:	List
List Name:	States
Return Column:	Location

Preview Lookup Data

CREATE CALCULATED FIELDS

String, numerical, and date calculations can now be created to populate the values of your custom fields. You can also use the calculation builder to default values and populate line values from the header.

Field Calculation

Configure Invoice Entry Fields [Admin Mode]

You are currently editing invoice entry settings for all users.

Line Type: Header [Reset Default] [Add] [Edit] [Remove]

Preview - Click or tab into the field you would like to configure.

Vendor: Invoice #: Descr
Invoice Date: Due Date: [highlighted]
Invoice Total: Accounting Date:

Field Properties

Source: Due Date
Display Text: Due Date
Is Tab Stop: Yes
Input Width: [slider]
When to Require: Not Required

NOTE: Calculated fields will not be editable by processors or reviewers.

OK Cancel

Edit Calculation [Remove Calculation]

General Information

Name: Due Date Calculation

Build Calculation

Invoice Date + 30

Choose Result Field

Line Type: Header
Field: Due Date
Type: Date

Test Calculation

Input Fields

Invoice Date: 4/25/2022

Result Field

Due Date: 5/25/2022

OK Cancel

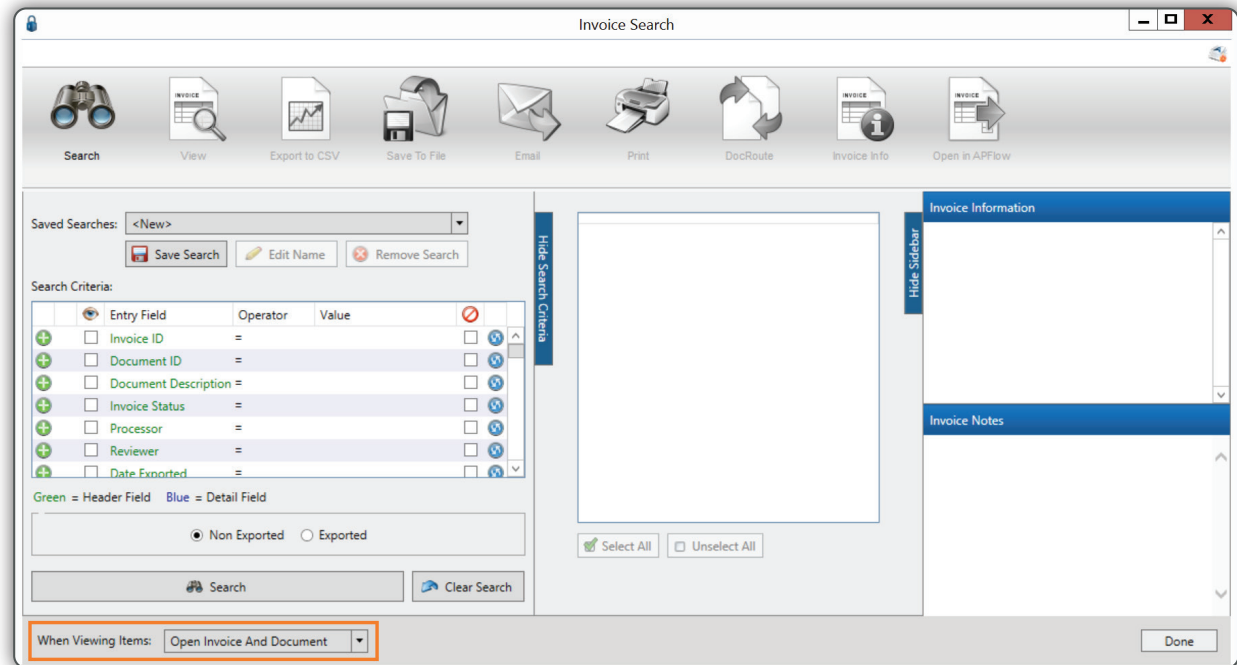
INVOICE SEARCH ENHANCEMENTS

The functionality of opening a document when viewing an invoice has been enhanced. Now you can view documents and/or invoices with or without opening an invoice while in Invoice Search.

If you select *Open Document*, the actual document displays in an **Image** tab window with the **Invoice Search** screen visible in the background.

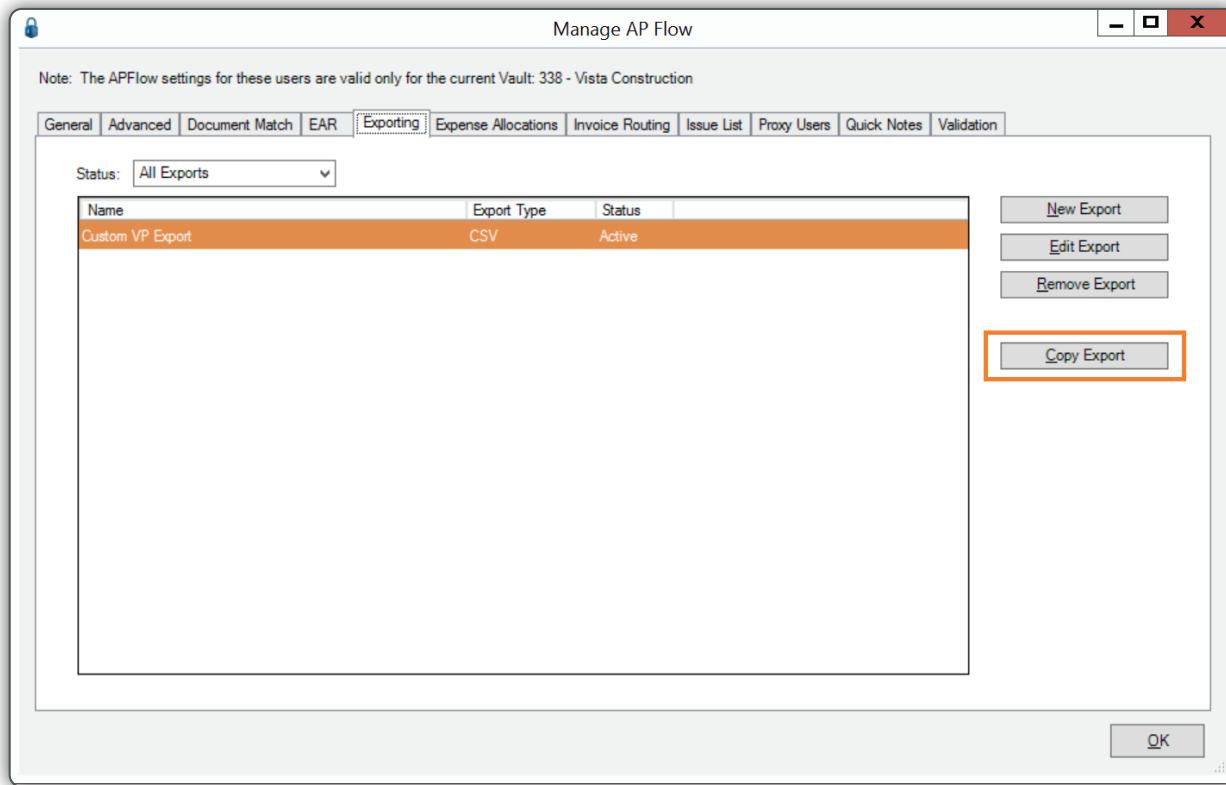
If you select *Open Invoice*, the **Invoice Entry** screen displays with fields populated. The **Invoice Search** screen is visible in the background.

If you select *Open Invoice And Document*, both the invoice document displays in an Image tab window as well as the **Invoice Entry** screen. The order of the screen display depends on what was visible most recently.



COPY CSV EXPORT CONFIGURATIONS

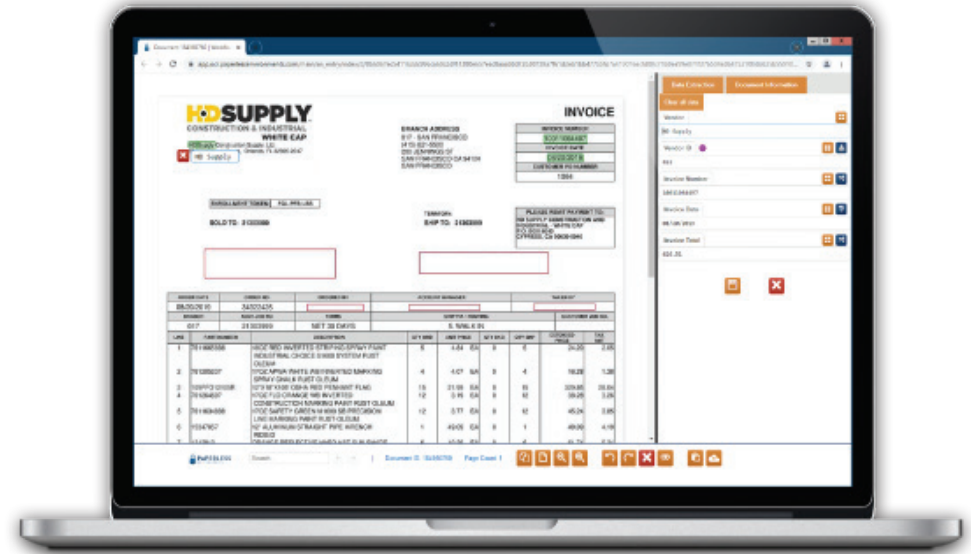
You can now copy a CSV export configuration from one vault to another, as long as both are bridged to the same accounting system.



PAPERLESS OCR

WE HAVE EXPANDED OUR POPULAR OCR FUNCTIONALITY!

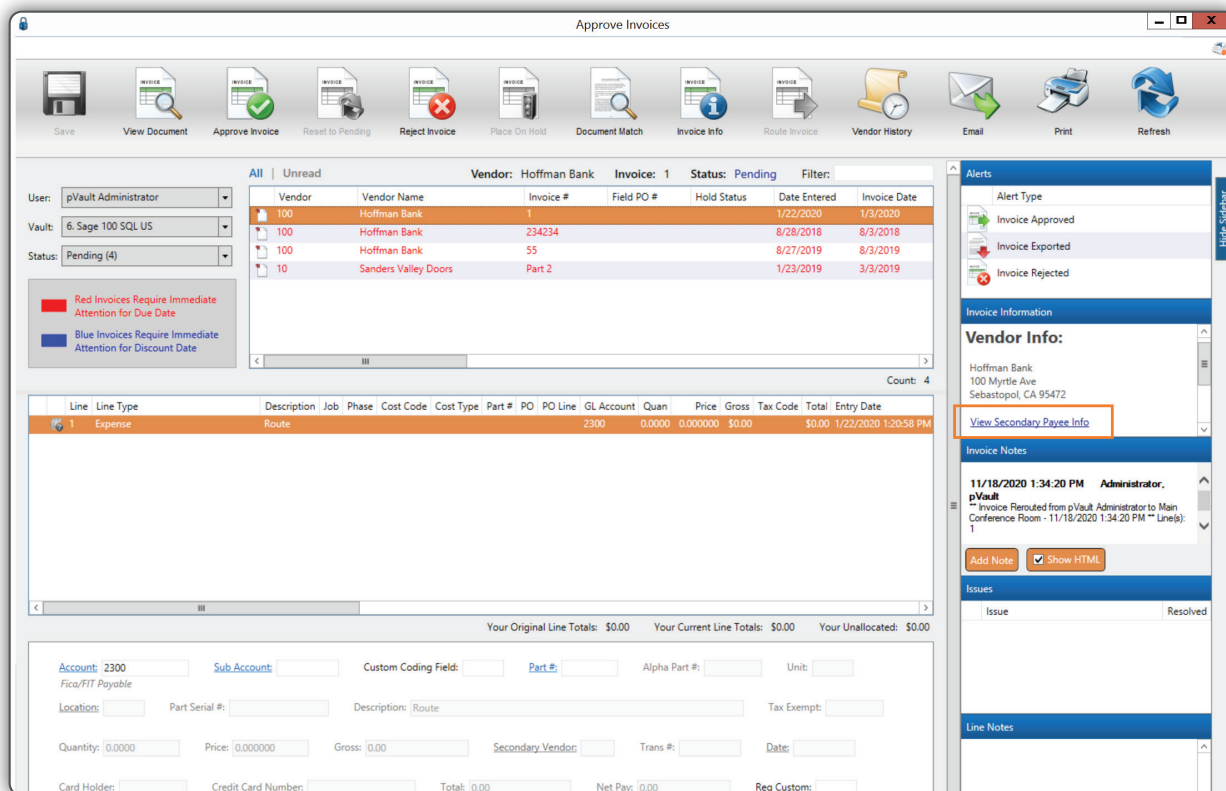
- Our OCR queue now **automatically refreshes** the status of your documents, so no more clicking the Refresh button to see if the document has returned.
- Our OCR Invoice Starter Pack reads the vendor, invoice number, invoice date, invoice amount, and purchase order number.
- You can now configure purchase order and subcontract fields read by OCR to automatically open their respective quicklists to expedite adding commitment lines.
- Our OCR engine can now apply your allocation rules and **auto-route** the invoice.



SAGE 100 CONTRACTOR ENHANCEMENTS

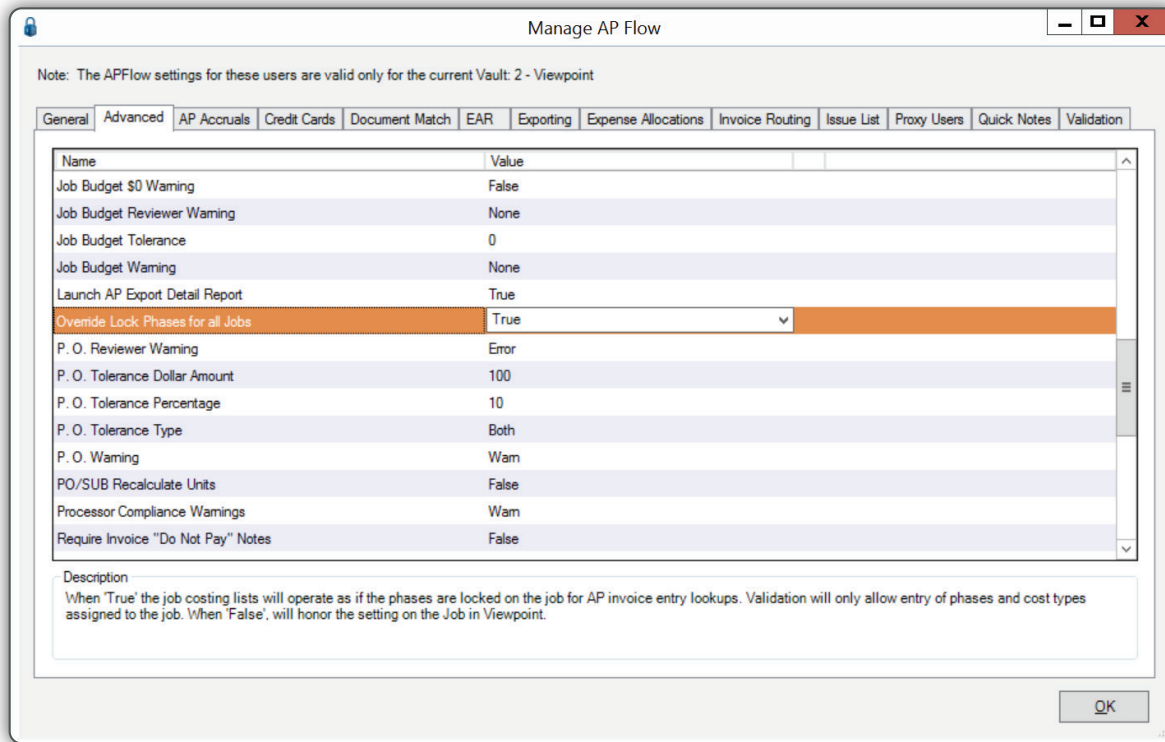
Secondary payee information is now available for reviewers in our Approve Invoices module.

A link was added to the **Approve Invoices** screen so that Reviewers can see the secondary payees and totals when they are approving subcontractor invoices if a joint check payment is required.



VIEWPOINT VISTA ENHANCEMENTS

There is a new Advanced Bridge setting for Viewpoint: **Override Lock Phases for All Jobs**.




When set to *True*, the job costing lists will operate as if the phases are locked on the job for AP Invoice Entry lookups. Validation will only allow the entry of phases and cost types assigned to the job.

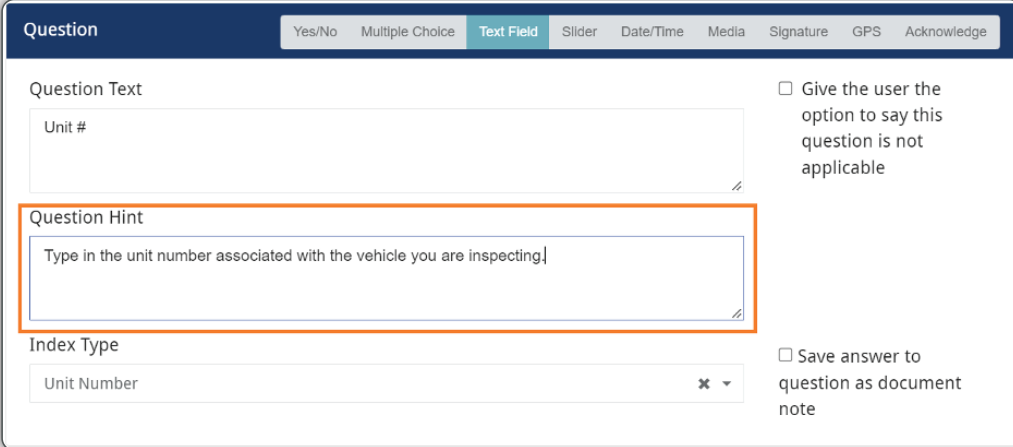
When set to *False*, the setting on the Job in Viewpoint will be honored.

eFORMS™ ENHANCEMENTS

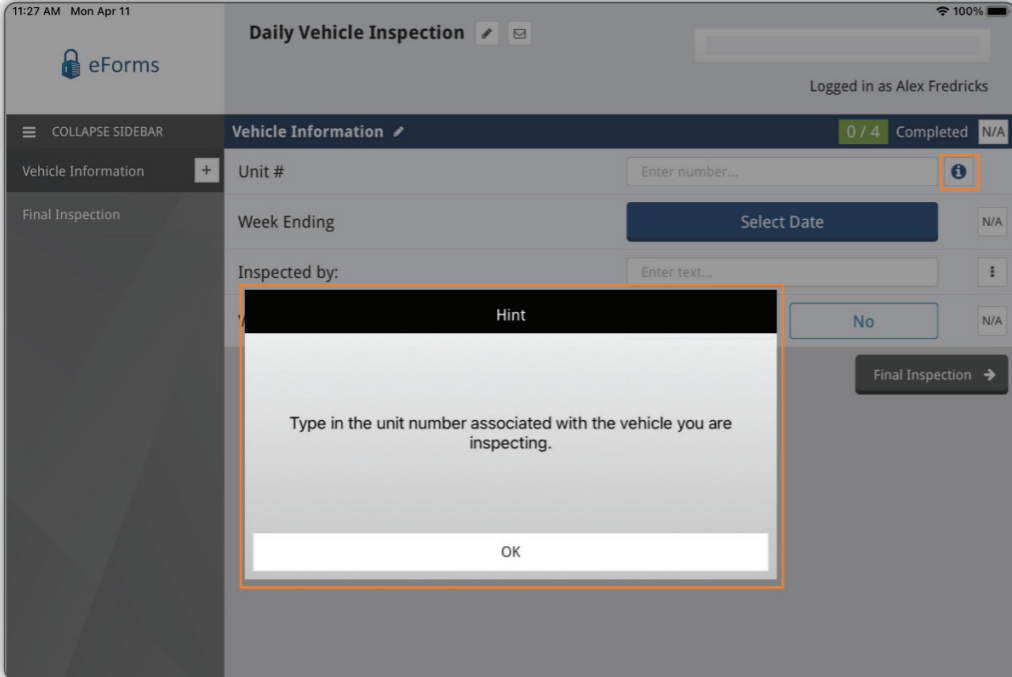
QUESTION HINTS

We have added the ability to add instructions or “hints” to the questions on your eForms™. From the administration screen, you will see a **Question Hint** section below the **Question Text** field. Type in the hint you want to display with this question.

In the eForms™ app, the  icon will appear next to questions that have hints associated with them. Tapping on the icon will reveal the hint, as shown below.



The screenshot shows the administration interface for a question. At the top, there is a navigation bar with tabs for 'Yes/No', 'Multiple Choice', 'Text Field', 'Slider', 'Date/Time', 'Media', 'Signature', 'GPS', and 'Acknowledge'. The 'Text Field' tab is selected. Below the navigation bar, there are three main sections: 'Question Text', 'Question Hint', and 'Index Type'. The 'Question Text' section has a text input field containing 'Unit #'. The 'Question Hint' section has a text input field containing 'Type in the unit number associated with the vehicle you are inspecting.' The 'Index Type' section has a dropdown menu with 'Unit Number' selected. On the right side, there are two checkboxes: 'Give the user the option to say this question is not applicable' (unchecked) and 'Save answer to question as document note' (unchecked).



The screenshot shows the eForms app interface for a 'Daily Vehicle Inspection'. The app is logged in as 'Alex Fredricks'. The main screen displays a 'Vehicle Information' section with a progress indicator '0 / 4 Completed N/A'. The 'Unit #' field has an 'Enter number...' prompt and an information icon (i) next to it. A 'Hint' dialog box is open, displaying the text 'Type in the unit number associated with the vehicle you are inspecting.' and an 'OK' button. The background shows other fields like 'Week Ending' with a 'Select Date' button, and 'Inspected by:' with an 'Enter text...' prompt.

eFORMS™ ENHANCEMENTS CONT.

SAVING TEXT FIELD ANSWERS AS DOCUMENT NOTES

Many customers have asked for the ability to save text questions to the document notes of the form saved in pVault®. When setting up or editing a Text Field question, simply check the **Save answer to question as document note** checkbox.

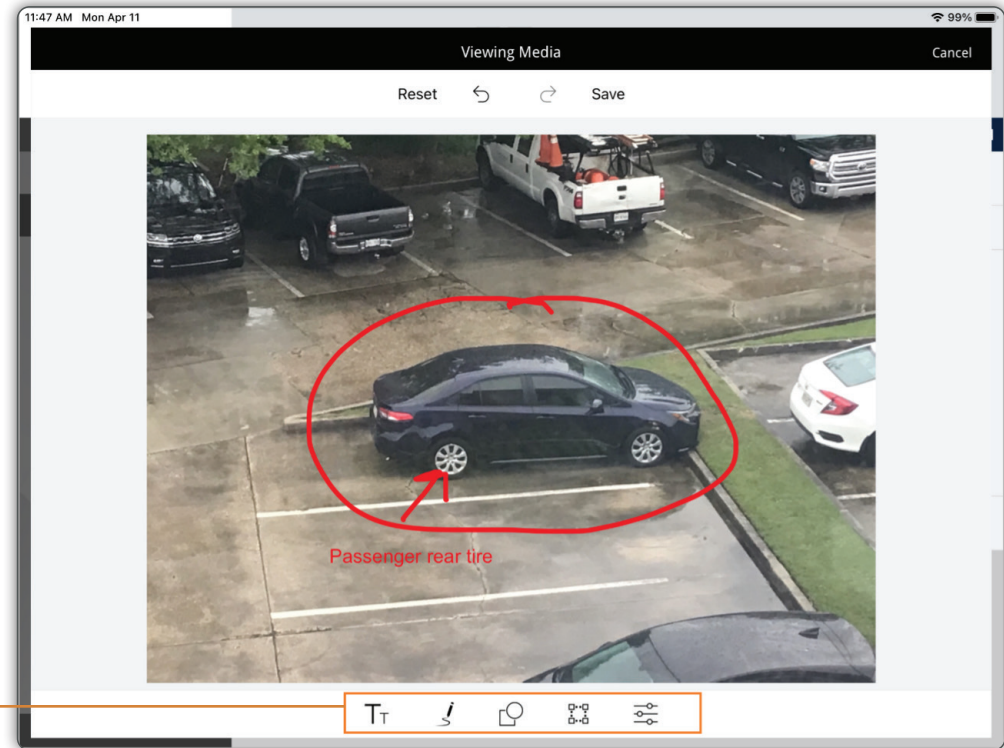
The screenshot shows the 'Question' editor interface. At the top, there is a navigation bar with tabs for 'Yes/No', 'Multiple Choice', 'Text Field', 'Slider', 'Date/Time', 'Media', 'Signature', 'GPS', and 'Acknowledge'. The 'Text Field' tab is selected and highlighted with an orange box. Below the navigation bar, there are three main sections: 'Question Text' with a text area containing 'Inspection Notes', 'Question Hint' with a text area containing 'Enter detailed notes concerning your inspection..', and 'Index Type' with a dropdown menu showing 'Select Index type...'. On the right side of the form, there are two checkboxes: 'Give the user the option to say this question is not applicable' (unchecked) and 'Save answer to question as document note' (checked). The 'Save answer to question as document note' checkbox is highlighted with an orange box.

eFORMS™ ENHANCEMENTS CONT.

EDIT IMAGES ON THE TABLET APP

We have added extensive editing capabilities to the media question in eForms™.

Tap on the photo to bring up the **Viewing Media** screen. Editing tool icons are listed at the bottom of the screen.



TEXT TOOL

This tool allows you to add text to the photo. Add text, select font size, color, alignment, and transparency.



FREEHAND TOOL

Use this tool to draw lines with your finger or pointing device. Select line size, color, and transparency.



SHAPE TOOL

Use this tool to draw squares, circles, or arrows on a photo. Choose line size, color, and transparency.



CROP, ROTATE & FLIP TOOL

Use this tool to crop, rotate or flip photos.



PICTURE EDITOR TOOL

Change the hue, saturation, brightness, contrast, blur, and sharpen aspects of the photo.

eFORMS™ ENHANCEMENTS CONT.

NEW! ACKNOWLEDGEMENT QUESTION

A new **Acknowledge** question has been added to the list of question types for a form. This question is used to present text that you want the form user to “acknowledge.” Oftentimes, this is used for legal policy memos that must be acknowledged by the user.

The screenshot shows the configuration interface for an Acknowledge question. At the top, a navigation bar includes options like Yes/No, Multiple Choice, Text Field, Slider, Date/Time, Media, Signature, GPS, and Acknowledge (which is highlighted). Below this, the 'Question Text' field contains 'Policy Acknowledgement'. The 'Answer Type' section is titled 'Acknowledgement Memo' and contains a text area with the following text: 'I acknowledge that I have received a copy of the Policy and Procedures Manual, which describes important information about Paperless, and understand that I should consult the Human Resource Department if I have questions. I have entered into employment with Paperless voluntarily and acknowledge that it is for no specified length of time. Accordingly, either I or Paperless may terminate the relationship at will, with or without cause, at any time, for any reason or no reason.' Below the text area are two input fields: 'Accept Label' with the value 'Accept' and 'Decline Label' with the value 'Decline'. At the bottom, an 'Options' section shows two rows: 'Accept' with a star icon and a flag icon, and 'Decline' with a star icon and a flag icon.

The **Accept** and **Decline** answer labels can be customized to whatever you want them to be.

eFORMS™ ENHANCEMENTS CONT.

12:11 PM Mon Apr 11

Daily Vehicle Inspection [edit] [share]

Logged in as Alex Fredricks

Final Inspection 0 / 5 Completed

Vehicle Information +

Final Inspection

Capture your current GPS location

Inspection Notes [info]


Inspection Photo [info]

Signature

Policy Acknowledgement [warning]

Acknowledgement Text

I acknowledge that I have received a copy of the Policy and Procedures Manual, which describes important information about Paperless, and understand that I should consult the Human Resource Department if I have questions. I have entered into employment with Paperless voluntarily and acknowledge that it is for no specified length of time. Accordingly, either I or Paperless may terminate the relationship at will, with or without cause, at any time, for any reason or no reason.

The user can click the  icon of the Acknowledgement question to view the memo.



pVAULT®
ENTERPRISE CONTENT MANAGER

PaperlessEnvironments.com | 225-218-4768