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Introduction

The purpose of this document is to illustrate the process for changing the Fiscal Year property on a Claims Processing Document profile.

Summary Process*

Open Document Locator Locate the appropriate document Right click, select Update Profile

Enter in the correct Fiscal Year Check 'Only Update Property Values that Changed' Close document to check it in

Right click, select Workflow, Workflow Request

Select the workflow of 'Move and Rename CL Workflow'

Verify document is named correctly, in the correct folder and has the correct year when the workflow is complete.

*This process can be done on multiple documents at one time if the fiscal year is the same.

Detail Process

Single Document

Locate your document, right click and select "Update Profile."

Name /		Claim Number	Fis	cal Year	Versie
63973_2014	12015.tif	63973	20	142015	1
7/// 63974_201	0	*****		42015	1
63975_201	Open			\$2015	1
100 63976_201	Open With		>	12015	1
63977_201	Send		>	\$2015	1
63978_201	Export		~	12015	1
63979_20	export			12015	1
63980_20	Print			12015	1
63981_20	Print with Bla	ck lce		12015	1
63982_20	View			\$2015	1
63983_201	Charle Out			12015	1
63984_20	Check Out			\$2015	1
63985_20 1	Get Latest Ver	rsion		\$2015	1
111 63986_201	Create PDF V	ersion		\$2015	1
100 63987_201	Create PDF V	ersion Adobe		12015	1
63988_20 1				12015	1
100 63989_201	Workflow		>	12015	1
63990_201	Create Shared	d Link		\$2015	1
111 63991_20	Create WebT	ools Link		\$2015	1
100 63992_20 1	create meon	Jois Link		\$2015	1
<u></u> 63993_201	Show Differen	nces		\$2015	1
100 63994_201	Cut			12015	1
100 63995_201	cut			\$2015	1
201 63996_201	Сору			\$2015	1
63997_20 1	History		>	\$2015	1
100 63998_201				12015	1
100 63999_201	Delete			\$2015	1
64000_20	Rename			\$2015	1
64001_20	Document N	otes		\$2015	1
100 64003_20				12015	1
<u>700</u> 64004_201	Collections		>	\$2015	1
64005_201	Update Reco	d Policy		12015	1
	Update Profil	e .			
	Properties		To-		
	. topercies				

In this window, select the correct Fiscal Year from the drop down. Ensure the "Only update property values that changed" box is checked.

Dranarty	Value	Decrired
Claim Number	63974	Kequireu
Fiscal Year	20122013 20132014 20142015 20152016 20152017 20172018 20182019	 <u></u>
Update Auto Generated pro Update Bates Number prope Only update property value	perties rties s that changed	

<u>Note:</u> If you do not see the correct Fiscal Year, contact Solutions Document Locator team at <u>dl@gmdsolutions.com</u> and request that we add the new year.

Once you have selected the correct Fiscal Year, select Ok to continue.

Update Auto Gen	erated properties			
Update Bates Nur	mber properties			
Only update prop	erty values that (changed		

Once the Fiscal Year is changed, request a Move and Rename CL Workflow.

To do this, right click that document and select "Workflow Request."

Name /	Claim Number	Fiscal Year	Version	Checked Out By	Modified
700 63973_20142015.tif	63973	20142015	1		2015-04-1
777 63974_20132014.ti	60074	20142015	1		2015-04-1
700 63975_20142015.t	Open		1		2015-04-1
7 63976_20142015.t	Open With	>	1		2015-04-1
7 63977_20142015.t	Send	>	1		2015-04-1
7 63978_20142015.t	Schum	· · · ·	1		2015-04-1
700 63979_20142015.t	Export	>	1		2015-04-1
700 63980_20142015.t	Print		1		2015-04-1
7 63981_20142015.t	Printen Drietwith Disch Iss		1		2015-04-1
700 63982_20142015.t	Print with Black Ice		1		2015-04-1
700 63983_20142015.t	View		1		2015-04-1
700 63984_20142015.t	Check Out		1		2015-04-1
700 63985_20142015.t	Get Latest Version		1		2015-04-1
700 63986_20142015.t	Create PDF Version		1		2015-04-1
700 63987_20142015.t	Create DDE Version Adol		1		2015-04-1
7 63988_20142015.t	Create PDI Version Adol		1		2015-04-1
7 63989_20142015.t	Workflow	>	Workflow	Request	
7 63990_20142015.t	Create Shared Link		Create Do	cument Reminder	
700 63991_20142015.t	Create Mal Tasla List		E l'i D	eumene Kerninden	
700 63992_20142015.t	Create Web loois Link		Edit Docu	ment Keminder	
700 63993_20142015.t	Show Differences		1		2015-04-1
700 63994_20142015.t	<u>.</u>		1		2015-04-1
700 63995_20142015.t	Cut		1		2015-04-1
7 63996_20142015.t	Сору		1		2015-04-1
700 63997_20142015.t	History	>	1		2015-04-1
7 63998_20142015.t			1		2015-04-1
700 63999_20142015.t	Delete		1		2015-04-1
700 64000_20142015.t	Rename		1		2015-04-1
700 64001_20142015.t	Deserved Marker		1		2015-04-1
700 64003_20142015.t	Document Notes		1		2015-04-1
700 64004_20142015.t	Collections	>	1		2015-04-1
700 64005 20142015.t			1		2015-04-1

Select the correct Workflow from the drop-down menu.

You may have a different workflow name such as "Move and Rename Claims Processing." If you do not see either of these workflows, contact Solutions.

63974_20132014.tif	Path DocLocatorSoluti	ons\Documents\	Claims	Processin
_				
			1	
		<u>A</u> dd		<u>R</u> emove
elect Route To Start:				
			•	Custom
lip from a Titled Vehicle to Trailer			^	
fanual Step Only				
filitary Records				
Iotor Vehicle Validation AutoPopulate				
Actor Vehicle Validation Full				~
fotor Vehicle Validation Full fotor Vehicles AutoName and AutoPath			×	
Aotor Vehicle Validation Full Aotor Vehicles AutoName and AutoPath Aove and Rename CL				
fotor Vehicle Validation Full fotor Vehicles AutoName and AutoPath fove and Rename CL				
Aotor Vehicle Validation Full Aotor Vehicles AutoName and AutoPath Nove and Rename CL				
Adoto Vehicle Validation Full Adoto Vehicles AutoName and AutoPath Move and Rename CL				

After selecting the Workflow, select Ok to continue.

Once the Workflow is complete, verify that the document is properly named and located in the correct folder.

Multiple Documents at Once

Locate and highlight multiple documents to change to the <u>same</u> Fiscal Year. Right click and select "Update Profile."

ame /	Claim Number Fis	cal Year
7## 83420_20142015.tif	83420 20	142015
700 83421_20142015.tif	83421 20	142015
700 83422_20142015.tif	Open	
700 83423_20142015.tif	Open With	>
mi 83424_20142015.tif	Send	>
02425_20142015.tif	Senu	-
7/// 05420_20142015.tif	Export	>
7/// 83428_20142015.tif	Print	
7// 83429_20142015.tif	Drint with Black Ice	
7## 83430_20142015.tif	Print with black ites	
7/// 83431 20142015.tif	view	
700 83432 20142015.tif	Check Out	
7// 83433_20142015.tif	Check In	
700 83434_20142015.tif	Undo Check Out	
700 83435_20142015.tif	Get Latest Version	
700 83436_20142015.tif	Create PDF Version	
700 83437_20142015.tif	Create PDF Version Adobe	
7/// 83438_20142015.tif	Workflow	>
7// 03439_20142015.tif		
7/// 83440_20142015.tif	Create Shared Link	
700 83442_20142015.tif	Show Differences	
700 83443_20142015.tif	Cut	
700 83444_20142015.tif	Conv	
700 83445_20142015.tif		
700 83446_20142015.tif	History	>
701 83447_20142015.tif	Delete	
7/// 83448_20142015.tif		
700 83449_20142015.tif	Collections	>
100 83450_20142015.tif	Update Record Policy	
100 05451_20142015.tif	Update Profile	
	Properties	

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Select the correct Fiscal Year from the drop-down menu. Ensure the "Only update property values that changed" box is checked.

Property		Value	Required
Claim Nur	nber	Tabe	×
Fiscal Yea	ar	20142015	•
		20102011 20112012 20122013 20132014 20142015 20152016 20162017	
	Warning!!! Do NOT type anyt This will change a	hing in the Claim Number Fie Il Claims to that number!!!	ld.
Update Update Only u	e Auto Generated properties e Bates Number properties pdate property values that d	hanged	

<u>Note:</u> If you do not see the correct Fiscal Year, contact Solutions Document Locator team at <u>dl@gmdsolutions.com</u> and request that we add the new year. Click Ok to continue.

Once this window opens, ensure that the only property showing is "Fiscal Year."



Click Yes to continue. Once updated, request a Move and Rename CL Workflow.

"Solutions" Image Services

Changing Fiscal Year Property in Claims Processing

Right click the selected documents and select "Workflow Request."

Name /	Claim Number	Fiscal Vea	r Version Checked Out By	Modified
100100	02420	20142015		2015 04
03420_20142015.tif	03420	20142015	1	2013-04-
03421_20142015.ttf	03421	20142015	1	2015-04-
100 83422_2014201:	Open		1	2015-04-
100 83423_2014201	Open With	>		2015-04-
m 83424_2014201	opentition			2015-04-
nm 83425_2014201:	Send	>		2015-04-
7/17 83426_20142011	Evnort	``	1	2015-04-
83427_2014201	Export		1	2015-04-
777 83428_2014201	Print		1	2015-04-
700 83429_2014201:	Print with Black Ice		1	2015-04-
7// 83430_2014201:	View		1	2015-04-
83431_2014201	Check Out		1	2015-04-
7777 83432_2014201:	Check Out		1	2015-04-
mm 83433_2014201:	Check In		1	2015-04-
7777 83434_2014201	Undo Check Out		1	2015-04-
7777 83435_2014201	Get Latest Version		1	2015-04-
mm 83436_2014201:	Create PDF Version		1	2015-04-
83437_2014201	Create PDF Version Adobe		1	2015-04-
mm 83438_2014201			1	2015-04-
83439_2014201	Workflow	>	Workflow Request	-
mm 83440_2014201	Create Shared Link		Workflow Multi Vote	-
mm 83441_2014201	create anarea enne		County Do surrout Bossia day	
mm 83442_2014201	Show Differences		Create Document Reminder	-
mm 83443_2014201	Cut		Edit Document Reminder	-
mi 83444_2014201	cut		1	2015-04-
mi 83445_2014201	Сору		1	2015-04-
mi 83446_2014201	History	>	1	2015-04-
mii 83447_2014201			1	2015-04-
mii 83448_2014201	Delete		1	2015-04-
7777 83449_2014201	Collections	>	1	2015-04-
700 83450_2014201:			1	2015-04-
700 83451_2014201	Update Record Policy		1	2015-04-
	Update Profile			
	Properties			

Select the Move and Rename CL Workflow from the drop-down menu. You may have a different workflow name such as "Move and Rename Claims Processing." If you do not see either of these workflows, contact Solutions.

File Name	Path			
700 83420_20142015.tif	DocLocatorSoluti	ons\Documents\(Claims	Processin.
700 83421_20142015.tif	DocLocatorSoluti	ons\Documents\(Claims	Processin.
700 83422_20142015.tif	DocLocatorSoluti	ons\Documents\(Claims	Processin.
700 83423_20142015.tif	DocLocatorSoluti	ons\Documents\(Claims	Processin.
<				>
		Add	1	<u>R</u> emove
elect Route To Start: Ip from a Titled Vehicle to Trailer			-	Custom
elect Route To Start: Tip from a Titled Vehicle to Trailer famel\$ Step Only filtary Records totor Vehicle Validation AutoPopulate fotor Vehicle Validation Full			• •	Custom
elect Route To Start: Tip from a Titled Vehicle to Trailer Annu& Step Only Manual Step Only Military Records Notor Vehicle Validation Full Actor Vehicle Validation Full Actor Vehicle AutoName and AutoPa Move and Rename CL	th		 	Custom

Once you have selected the proper Workflow, ensure that the "One route instance per file" option is marked. This allows the Workflow to continue other documents if one stops in error. Select Ok to continue.

Once all Workflows are complete, verify that the documents are properly named and located in the correct folder.