What’s New in PaperClip Virtual Client Folder Version 2.6

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**User Ease**

**Copy/paste a document to another Folder**

The ability to select a document to copy and then paste it into another folder.

Click on the *Context Menu* button for the document user wants to copy.

Choose *Copy*.

Click on the *Context Menu* button of the folder user wants to copy the document into. Choose *Paste*.
User will receive a verification message. Click “OK.”

A Success Message will appear in the upper right hand corner of system letting user know document was copied successfully. *Note: User cannot copy more than one document at one time into a folder.

Create “like” folder or document
Option to create a new folder or document using the same data from the selected one. When using this option, all the data will be copied into the form allowing user to change only what is needed to create the new folder or document.

At the folder level:
User clicks on Context Menu button of folder. Choose Add Another Like This.
At the document level:
Indication of Documents Viewed
Documents that the user has opened within the folder are automatically highlighted. Once the user navigates away from the current folder list in view, these highlights are removed.

Document Quick View
This feature is available on the Desktop and Document Search page as a pop/left slide out. While in the Quick-View the user is able to view all the documents at once, page through each document, edit the document properties, edit the document and view the entire document at full resolution. For non-image documents user will be able to download the document and edit the document properties.

Choose document(s) by clicking check box to left of document. Click on Quick View Icon.
Helpful Note: While in *Quick view*, user can select multiple documents at once and then go to the context button at the top and choose to modify multiple documents at once.
From the Document Search page:

**Document Lite View**

Option to open a document for viewing in a pop-up window without leaving the Desktop. A “lite” version of our viewer, with its quick functionality, it’s helpful for doing research in PaperClip. The *Lite View* allows user to open a document to view without opening another instance of PaperClip. The Pop-up window provides ability to quickly view the selected document in current Folder. User can scroll through pages, zoom, and make the document full screen. X to return to PaperClip desktop.
Drop File List
The ability to Drag-N-Drop document files from your desktop to a temporary storage area for later filing in PaperClip. This builds a *Drop File List*.

- *Drop File List* can be viewed/hidden any time during user session
- Any file from the list can be added to current selected folder
- Files are removed upon logout or when browser is closed.
- *Note*: These files are only available to the logged in user who adds them.

Click on *Drop Files* icon.

Temporary storage area pops open.
User can drag-n-drop files into the Drop File List. This is a temporary storage area.

When ready, choose the folder you want to add the document to. Folder line item will be highlighted. Click Add button.

Label your document and then click “Save.”
**Helpful hint:** User needs to be sure they are in the correct folder when adding a document from the *Drop File List*. Be sure to look at the folder first to confirm which one is highlighted to know where the documents are going to file.

![Image of document management interface]

Document has been removed from the queue. Choose the next document to file and which folder you want to file to.

User can also add to the queue by clicking *Browse Files* button. This will import documents from your computer into the *Drop File List*.

![Image of file browser]

Documents can be removed from the *Drop File List* by using the *Remove* Button. Files are also removed upon logout.

![Image of file browser with removed document]

To hide the *Drop File List*, click the “X” button in the right hand corner of the temporary storage area.

![Image of file browser with hidden Drop File List]
**Edit Document in New Tab**

There is a new *Edit Document in New Tab* option from *Context Menu*. This opens the selected document for editing in a new browser tab. This option can be accessed on the desktop by using the document *Context Menu* and on the Document Search page.

On the desktop:

![Desktop screenshot showing the new tab feature.

On the Document Search Page:

![Document Search page screenshot showing the new tab feature.

From the desktop multiple documents can be opened in new browser tabs by selecting in the check box at the left for multiple documents. Then select the top *Document Context Button* and choose *Open Selected Documents in New Tabs*. 

![Additional screenshot showing the selected documents.

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Added description field to multi-document update feature
The option to update multiple documents at once now includes the ability to update the description field for all documents selected.

Added Folder Description column to Document Search and Recycle Bin Page

Document Search:

Recycle Bin:
Desktop Auto-Refresh
Triggered now only when a change (Folder/Document Add or Modify) is detected to the user selected drawer. Historically, this was based on a time interval and not “smart.”

Arranging Folder and Document Columns
Can now be done by using up/down buttons. User goes to Folder/Document Grid Settings icon. Then can quickly and easily reorder columns.
Desktop Settings Button
From the Desktop Settings button (upper right-hand corner of the system) user can change skins, change timing of refresh interval, and change if a PDF is opened in a viewer outside of PaperClip or inside it. (tiff image too)

Options to choose different color schemes, or skins, for PaperClip.

Options to change the Refresh Interval:
Option to change if a PDF (or Tiff) is opened in a viewer outside of PaperClip.

Apple iMac/iPad Support
Ability to add and view documents

Aesthetics
Updated User Interface
A new refined look and feel with improved responsiveness. More capabilities and information are now at your fingertips without having to wait for page loading delays.
New menu of document action items in the upper right of document section (also at the folder level).

New *Context Menu* icon for each document (also at the folder level). This means less clicks are required to perform all operations on a Folder or Document.

New look of the document viewer
Easy to read Success Messages. Example: Document Changes Saved

Security

Two Factor Authentication

Option to enable two factor authentication for user logins. When enabled, this option will send user an email containing a code or OTP (onetime passcode) that user will need to enter when logging in. This code will expire within 3 minutes.
Whitelist IP Address (Restrict access to system based on location)
Feature to configure IP addresses which allow access to the system. When configured, this feature will prevent users from using the system outside of a place of business (at home, etc).

SAML Single Sign-on Support in Multi-Tenant Deployed Systems
Ability to configure SAML for tenants within a multi-tenant system of VCF.

Log User’s Origin IP Address for Auditing
Log the user’s origin IP address for auditing. This feature shows origin IP address in the user audit security events section of VCF.

Enhanced Document Encryption Key Management
New design to secure and manage content encryption keys (CEK) for encrypted document file at rest storage.
- CEKs are encrypted with a key encryption key (KEK)
- KEKs and CEKs are stored in a Microsoft Azure Key Vault
- Ability to generate new CEKs and KEKs as needed triggered by any of the following conditions:
  - Date/Time Schedule
  - Upon user request

AES-256 Encryption for at Rest Document
VCF has AES-256 encryption for document storage. Encryption keys are secured and stored within a Microsoft Key Vault. This encryption will always be used.

Administration
Active User List
A list of what users are configured in the system as well as which ones are actively using the system
- List includes user name, email, number of logins, last Login Date/Time
- Settable filters include:
  - Number of days to look back (default is 7)
- Show only users that are active (have logged in at least once over a time period)
- Show only users that are inactive (have not logged in over a time period)
- Show all users
- Option to export User List

Communication

Service Expiration Alert Message
Indicates to users of the system when their license expires. This message will be displayed upon login to the system. An alert will also be sent to PaperClip Support via email. Customers may have a grace period allowing use of the system for a period of time.

Example:
**Maintenance Notification Message**
This feature allows PaperClip staff to post messages system wide (e.g. Maintenance Notices). These messages are displayed to the user on the sign-in page.

**System Notification Messages**
A messaging system on the desktop that will be used by PaperClip to communicate alerts and informational messages about system maintenance service updates and other information to users of the system.