



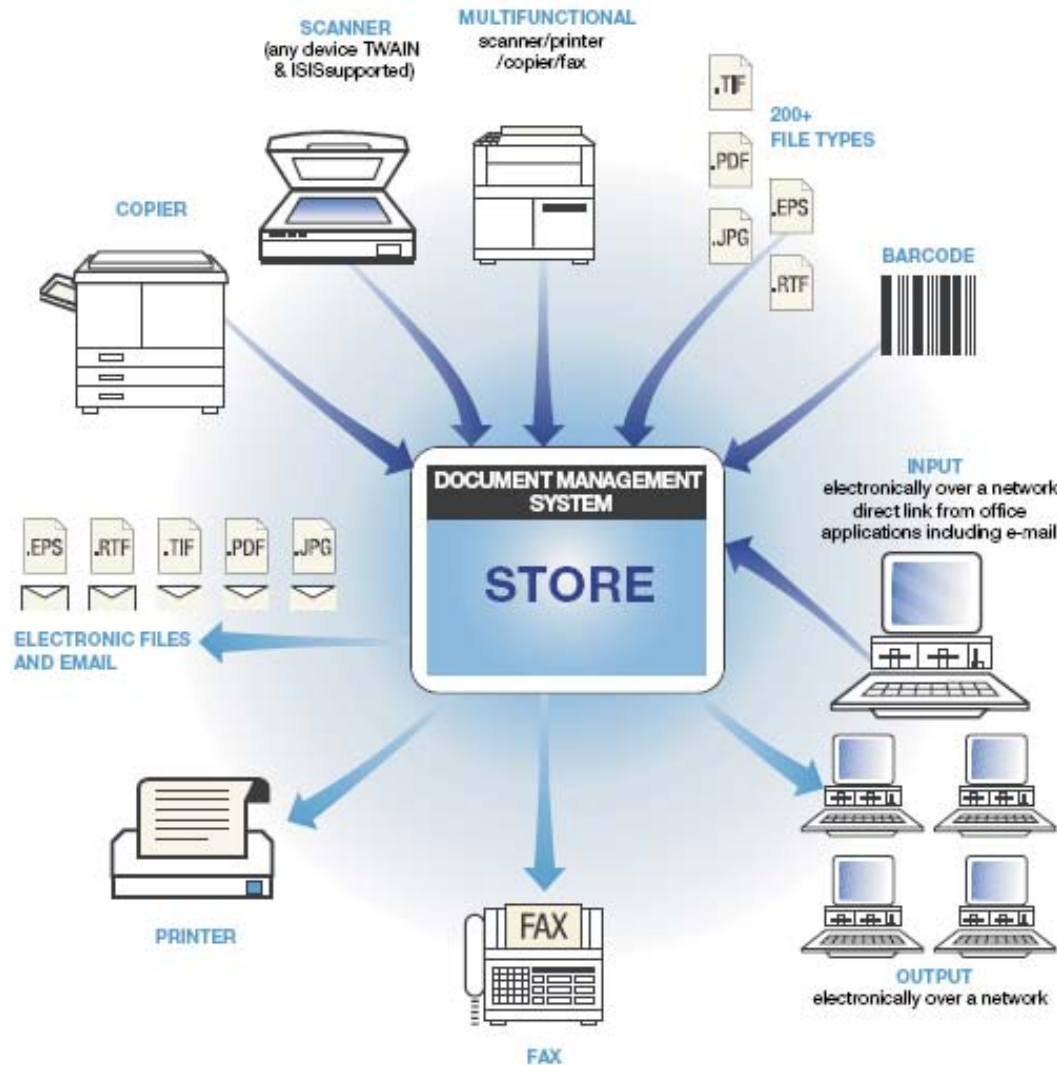
The Solution

what is FILEstream document management?

FILEstream is a computerised document organising system incorporating both electronic and paper files within an efficient virtual filing cabinet.

FILEstream offers a variety of filing techniques, ensuring that documents of varying content and style can always be found efficiently. FILEstream can be installed as a standalone or as a networked system with up to 250+ users.

It integrates with Microsoft® Office applications.



The Value Proposition

- A leading software provider
- World-class products
- Exceptional service
- A partner committed to your success

what are the benefits?

ALL documents can be incorporated into one system.

Scanning technology makes the transfer of paper documents to a computer fast, efficient and easy.

The import of existing electronic documents, fax and e-mail is effortless.

Applications with the facility to print to file as a recognised file type can be sent directly to FILEstream. Frequently used company documents can be created from within FILEstream guaranteeing capture.

Powerful and flexible control of user access to documents and functions safeguards the files within the system.

By default, all documents are encrypted.

Document Management offers further advantages including:

misplaced documents or files

Powerful and flexible filing - the same document can be filed under several references, which is not possible with paper documents or normal computer files unless copies are made.

Documents can be distributed or shared instantly between users and departments, saving valuable staff time previously spent moving between departments seeking information.

Customer queries can be answered quickly as information is available from the screen without leaving the desk.

why FILEstream?

FILEstream is easy and enjoyable to use but at the same time is powerful, flexible and reliable, offering a comprehensive solution.

FILEstream is rich in useful features. Today's product has substantially grown using the helpful suggestions and feedback of existing customers. FILEstream uses industry standard Microsoft® technology including MS SQL and .net framework.

FLEXIBLE FILING

The filing structure within FILEstream will be significantly more effective and versatile than existing manual procedures and systems. Different documents require different filing techniques e.g handwritten vs. printed. Manual tagging (made even easier with 'dropdown lists').

Automatic / semi automatic / bulk indexing.

Total document OCR – a choice to OCR only or part of the first page is standard.

Regional OCR.

Selected pages from a document can be indexed separately.

Advanced OCR Profiling (module).

Barcode (module).

powerful search capabilities

Filed documents can be searched for across individual or multiple cabinets in a variety of ways:

INDEX SEARCH

By indexed field value(s).

Less than / more than / between / equals options.

OCR SEARCH

By OCR capture – word (or part of), words or phrases.

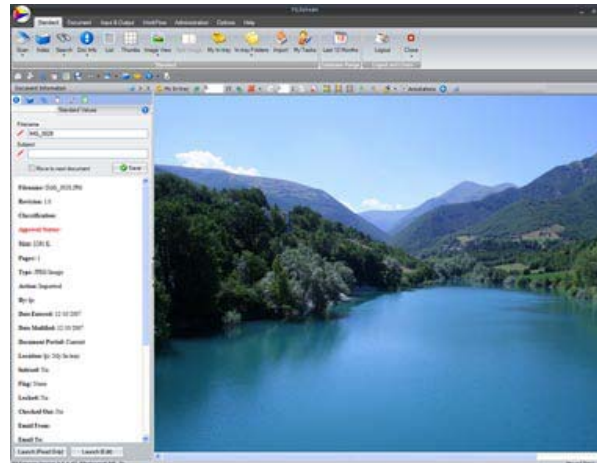
Ability to search attachments that have been OCR'd.

FURTHER SEARCH

By e-mail header information including from / to / subject etc.

By general information including file name / action / performed by / flags / no of pages / workflow status.

All of the above methods can be filtered by a 'system entered' or 'last modified' date range.



other important features

Users have personal in-trays which can be shared with selected colleagues. Paper or electronic documents enter the in-trays via a number of routes - scanning, importing or being sent direct from third party applications.

Documents (or selected pages) can be conveniently sent from FILEstream via fax, e-mail, print or document export.

Reminders (timed) can be set and linked to documents alerting users to look at or action them in the future.

FILEstream has a versatile annotations tool which allows users to perform a variety of actions on image documents including creating their own system stamps, writing a 'post it' type note or electronic signature image.

FILEstream has its own sophisticated scanning interface. Documents can be autocorrected, separated by OCR or barcode, blank pages removed, profiles set for different documents etc.

Export index information to CSV / XML files allowing import into other software packages.

FILEstream has powerful but easy to use administrative functions making the system quick to set up and versatile in operation.

API tool available for integration with other products.

Modules

WORKFLOW (DOCUMENT ROUTING)

Documents can be automatically routed to users via a pre-determined workflow. Workflows are managed allowing documents to be tracked and their status monitored, according to the time allocated.

This is ideal for invoice approvals, drawings, project management etc.

BARCODE

FILEstream can read Barcodes and automatically populate index fields with the values.

ADVANCED OCR

Advanced OCR profiles for individual documents specifying criteria which improves the OCR capture and includes an easy to use checking feature. Handwriting and forms set up licences also available.

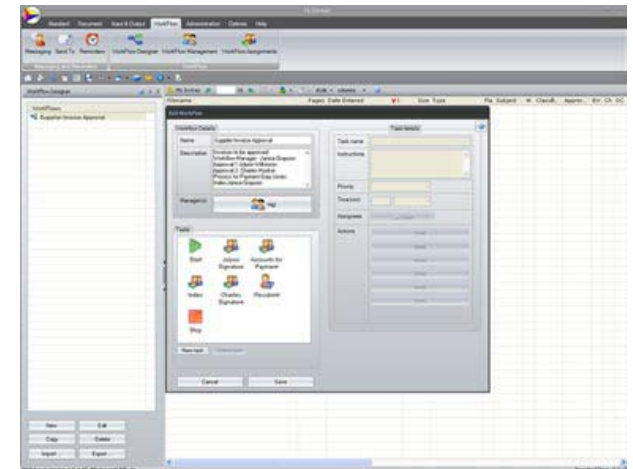
WEB

Allows access from any location with an internet connection.

CSV / XML IMPORT PLUS IMAGE CREATION (CUSTOMISED MODULE)

Allows data from other applications to be automatically imported, filed and indexed in FILEstream cabinets.

Customised document images can be created to display the data.



Specification

FILEstream scanning interface

simple scan:

file name / type
single page / multi page
show / hide interface
advanced scan:
scanning profiles
TWIN and ISIS
document grouping options
recognised by blank page insert,
OCR text or barcodes
auto correct / counter / auto date,
time, sequence numbers.(file name)
feeder options specify number of
pages and pages per document
OCR profiles
scan more (auto append)

indexing

single or multi-document index /
re-index / auto OCR fields or
whole document
index field setup: default value
/ mandatory / unique /
incremental number
field types : all / numeric / currency /
date / time / true or false / list /
barcode
hold existing value while indexing
follow fields: automatic selection of
document areas
intelligent automatic indexing of
profile associated documents including
correction and validation tool.
(optional module)
barcode recognition (optional module)
relational fields
cross cabinet field update from master
list
multi select values from list

searching

index values (or any part of)
search across in trays, selected or all
cabinets
date range (entered / modified)
search indexed documents by
OCR 'd content
file name or any part of
WORD search locate OCR text in
document
filter cabinet content

append

image type document to an
existing document
insert start, end or selected point

image manipulation

rotate clockwise / anticlockwise
fit to height / width / full size /
whole screen
despeckle / deskew / auto correct
invert / zoom / dilate / erode / flip /
mirror / remove lines
edit multi-page documents by
grouping selected pages as
separate documents / removing
pages /changing the page order

viewing

multiple and shared in-trays
view documents as list files /
thumbnails / tiles / image / split image
/ single page thumbs / full screen
document locking, check in and
check out
list view one click column sort plus
three way filter
thumbnails locally cached for
quick access
work with selected documents
icons in all views when a document
has additional info.
inbuilt viewer displays over 200 file
formats as thumbnails or images:
(list available)

file import / export

file import and export from
FILEstream
drag and drop from Windows®
Explorer
to FILEstream
FILEstream toolbar in system tray
and menu in Outlook® for instant
access to in-trays / index / search
new document creation (for any
installed application) generated and
captured by FILEstream

annotations tools / notes

create / edit annotations such as
stamps / text / highlight / image
import / drawing / signature
temporary / permanent annotations
create barcodes (optional module)
associated public / private notes with
author, date / time stamp

printing

margin adjustment and page numbers

document attachments

any file type
remove, view, save as main
document,
edit (with application), OCR
view email attachments imported
from Outlook®

OCR - document

OCR total content / top or bottom
region / first page only to Database
regional OCR
OCR attachments
create editable files from image files
(OCR to file)
OCR profiling (optional module)
OCR profiling setup / correction tools
(optional module)
set field level capture criteria
(optional module)

document history

physical changes recorded
as revisions
full audit trail (action / user / date)
index / re-index, notes, attachments
status recorded
email, print, fax from history
deleted documents log, recycle bin /
permanent delete

user messaging

internal messaging system for
FILEstream users
send messages with search
links / attachments
generates automatic workflow
reminders (optional module)

communicate

send documents to individuals or
groups of users
output as print, fax and e-mail
document 'save as' out of FILEstream
output as searchable CD (optional
module)
output as CSV file

administration

user maintenance - logins, passwords,
pathways, lock out users, view users
logged on
send messages to users / all users
group maintenance – permissions
set up
cabinet maintenance
automatic system back up
select database range / additional
system options
report designer

document import and export
export / import files / cabinets
between
FILEstream databases
output as searchable CD (optional
module)

integration / customisation

API tool available

licensing

concurrent or fixed (client based)

database

Microsoft® SQL
multiple databases
create new databases from within
FILEstream
files are encrypted

PC specification (minimum)

OS: Windows® XP, Vista®
processor: Pentium 4
HDD: 1GB free space
screen resolution: 1024 x 768 32 bit
512MB RAM

optional modules:

barcode
advanced OCR (inc. xml)
handwriting
forms
web interface
searchable CDs
workflow
CSV / XML import plus image creation
(customised module)

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