



## ABOUT FILEHOLD

FileHold document management and records management software is an off-the-shelf solution that ships pre-configured with user roles and an intuitive and friendly file structure that mimics the physical filing hierarchy of Cabinet / Drawer / Folders. The software installation is fast and easy compared to "platform" based products that can require consultation and IT resources often measured in weeks and months.

Our document management software allows companies to embrace the "paperless office". Our standard software features and optional modules will meet company's needs.

# FileHold Enterprise



FileHold Enterprise is the fast track to the "paperless office" for medium to large size organizations with more than 20 users.

FileHold Enterprise scalable to support thousands of users and millions of documents using Microsoft Technologies Service Oriented Architecture and the .NET framework.

## Out-of-the-Box Features

Some of our standard features include:

**Document Scanning Software:** Tested on over 300 document scanners to convert paper documents to searchable PDF's.

**Secure Access to Documents:** Use Microsoft Explorer or Mozilla FireFox web browser to gain access to documents from anywhere in the world.

**Mass Migrate:** From file-shares, third party applications directly into FileHold using "drag and drop" or XML importation.

**Version Control:** Keeps everyone on the same page while preventing accidental file overwrites and deletion.

**Structured User Rights:** To only the documents users have approval to see with a complete audit trail of document usage.

**Metadata Tagging:** Apply unlimited metadata schemas individually or on mass. Tag documents via drop down boxes.

**Simple and Complex Search:** "Google" like and advanced search to quickly find text or metadata (save and re-use searches).

**Powerful Reporting:** Leverages the power of SQL reporting Services to provide unlimited data mining of metadata.

**Integrate with other Applications:** Features to allow easy integration with other business applications. Fully documented web services API to move documents between systems.

**Document Linking:** Document to document linking allow users to link and organize files in logical groups.

**OCR and Indexing:** Convert scanned files into editable and searchable documents.

**Watched Folders:** Move files electronically into the library from local or network folders.

**Document Subscription:** FileHold document management software allows users to subscribe to and to be notified of edits or new versions to files or changes to folders they have subscribed to.



## A Common Sense Fee Structure

FileHold has broken the paradigm of document management software being expensive, confusing, and difficult to install. Our pricing is based on a common sense idea — a low cost per user fee and a charge based on actual usage or concurrent sessions.

It doesn't matter how your users are using the system; all features are available to all the users at the same low cost.

There are no scan or storage volume fees in FileHold.

## Installation and Training Options

FileHold software is so easy to install that it is done using remote communication technologies. Customers simply prepare their server according to a provided Server Preparation Guide (SQL Server and Windows Server from Microsoft required). Once the server is ready and the installation of the software is completed, remote configuration and training begins.

You control the Implementation and Training fees: FileHold offers three levels of detailed implementation plans: Gold, Silver or Bronze. You choose the level of support you will need for your implementation. FileHold provides online help, documentation, video tours, and training materials for self-paced training and configuration.

## Optional Modules

Some of our optional modules include:

**Document Workflow:** Document review and approval workflow for documents needing to be automatically routed through several authors, reviewers and approvers before being ready for general distribution.

**Document Viewers:** View CAD and over 200 document types directly in FileHold without the need for the native application.

**Mark Up:** Add printable watermarks, annotations, mark up, sticky notes and directly onto documents.

**Redaction:** Automatically black out sensitive information such as Driver Licenses numbers in documents.

**Scanning and Auto Filing:** FileHold XML auto filing routines automate the scanning of documents into the Library.

**Active Directory Synchronization:** For Microsoft Active Directory users, FileHold can provide a single point of user authentication.

**Print to FileHold:** Eliminate paper completely, send electronic copies of invoices or statements from your business applications directly to FileHold and have them filed automatically.

**Microsoft SharePoint:** The document management system can be installed as a "web part" of Microsoft Office SharePoint Server or Windows SharePoint Services. The software offers integration for SharePoint to users who want to implement the Paperless Office but need tools that are not inherent in SharePoint.