

FileHold Software - The Management of Documents and Records from Creation to Disposition

Information is the key currency of Business and Government. In today's world documents and records are predominantly in electronic form and need to be controlled from creation to disposition – this is called the **“Document and Record Lifecycle”**.

FileHold software manages the document lifecycle from the time documents are first created throughout the workflow and revision stages of their active life. When documents are no longer active they can be automatically or manually moved into electronic archiving (records). When these archived document are no longer needed, with the right approval, FileHold facilitates secure disposal.

Paper based and electronic information in the workplace is growing at an uncontrollable speed. Keeping that information secure, and when necessary in regulatory compliance, is very challenging. The FileHold “Paperless Office” is secure, compliant ready, reduces cost, and builds process efficiencies.

“On average, professionals spend 50% of their time looking for information.” ... Gartner Research

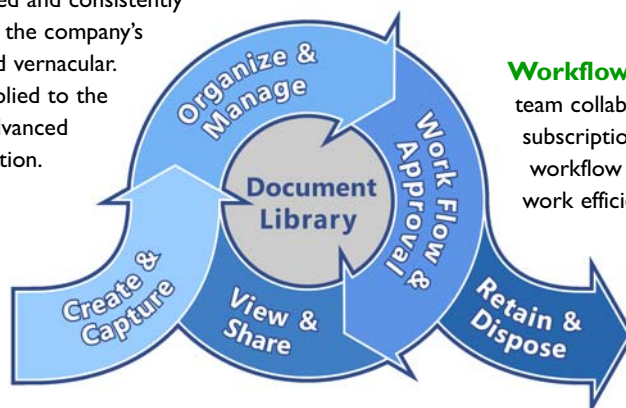
“Every lost document costs anywhere from \$350 to \$700.” ... IDC

The Document and Record Lifecycle

Following are the phases of the Document Lifecycle that FileHold software manages. At every step in the process the software provides advanced, but user friendly tools, to keep information current, relevant and usable.

Organize and Manage - To make documents usable they are classified and consistently structured in line with the company's business objectives and vernacular. Metadata tagging is applied to the document allowing advanced navigation and distribution.

Create and Capture - The document and record lifecycle **begins** when electronic information is created by users on computers or is captured from the web, e-mail or fax transmissions. Paper documents are being converted to electronic form by using dedicated document scanners or Multi Function Centers (MFC).



Workflow and Approval - FileHold tools facilitate team collaboration. Version control, document linking, subscriptions, alerts, document approvals and workflow ensures that team members are able to work efficiently on the task at hand.

View & Share - The powerful FileHold search engine indexes the text of every document prior to storage providing full-text and metadata search so that users can find documents in seconds. Documents can be retrieved via: email, a web browser, FileHold FastFind, Microsoft Office® and SharePoint® applications, information portals or through 3rd party applications.

Retain and Dispose - Throughout the lifecycle FileHold ensures users are only working with current and effective information. Policies can be set by managers, with proper authorization, to automatically destroy documents to comply with corporate and regulatory records disposition policies.

Features for Every Stage of the Document & Record Lifecycle

Create and Capture

Features for the addition and classification of content into FileHold

“Drag and Drop” - Documents from network drives or desktop applications, such as word or e-mail, can be quickly added to the library using drag and drop.

Mass File Additions - Mass importation of documents from other document management systems or structured data is made easy using the FileHold XML importation tool that automatically creates named folders.

Streamlined Document Classification - Metadata is added from a centrally controlled document schema making them easier to retrieve in the future.

“AutoTagging” - can automatically add pre-established metadata to documents that are added to an “AutoTagging” folder. (Matter Centric filing)

Document and Record Support - Manages all lifecycle stages for electronic documents and electronic records including rules and reports for archiving and disposition dates. Disposition reports can be generated as required.

Hardcopy Document Tracking - Add metadata to track the location of hardcopy paper documents that are outside of the FileHold system (on desks, in file storage rooms or at remote offices).

Scanning / imaging Paper Documents - The document management software provides fast integration with 3rd party imaging systems to add scanned documents to the library. “Out of the Box” FileHold support over 300 scanner types.

Manage and Organize

Features for the collaboration, revision and approval of documents

Version Control - Provides check in/check-out ability preventing documents from being overwritten or deleted as documents are updated. Previous versions of the file are maintained by the system in the event that rollback is required.

Linking and Shortcuts - Document-to-document linking or document to folder shortcuts allow users to bundle documents and files into logical groups and create bookmarks to documents that users frequently access. The document tray utility makes linking to documents across the library a snap.

Subscriptions, Alerts and Reminders - Subscribe to be notified of edits to documents or changes to watched folders. Users are alerted of changes via email or their private notifications list. Set reminders for documents such as contracts that need attention in the future.

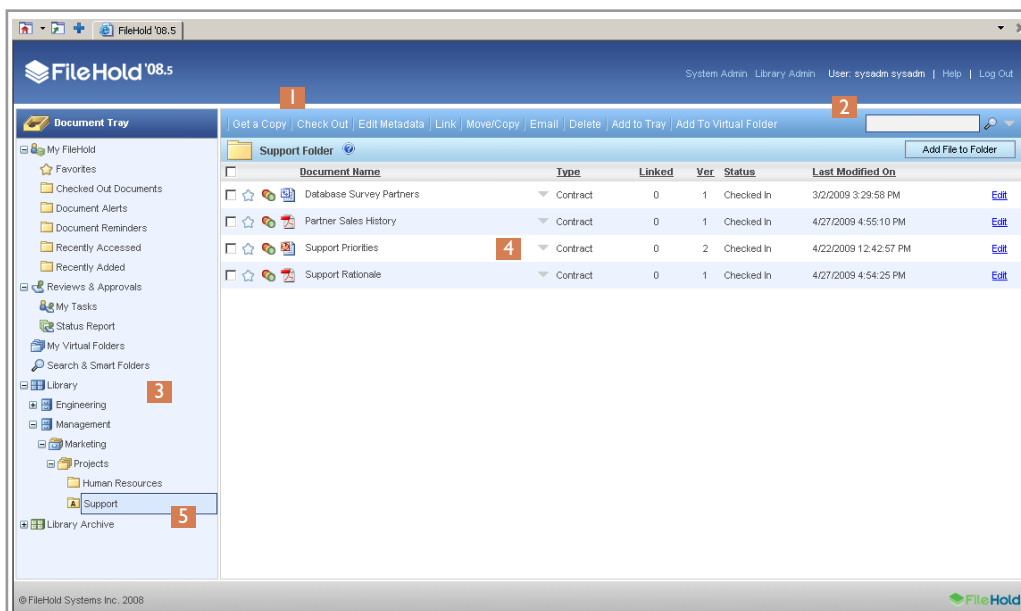
Smart and saved Search - Smart folders are searches that users save. When opened the search is run providing users with a live update to the content of the library no matter where the documents are located. Virtual folders - Allows users to aggregate links to documents located in various areas of the library no matter where they reside.

Workflow - For documents needing to pass through reviewers and approvers before they are ready for general distribution. Provides instant reports on the status of and documents in the review process.

Viewers - Document viewers allow viewing of documents without opening the native applications. Viewer features include mark up, sticky notes, annotations and redaction.

Document Staging and Publishing Areas - Quickly create staging and collaboration areas for documents as they are being worked on. Once approved, documents can be moved to publishing folders where they are protected from change or accidental deletion.

Auto Numbering - Apply version control numbers or Document Control numbers to documents in FileHold. These control numbers give administrators ultimate control. The numbering system can be displayed and printed on the document.



- 1 Easy to use, intuitive interface ensures fast user adoption by non-technical users
- 2 Powerful 'full text search' lets users find any OCR'd document quickly
- 3 Users only see public and personal folders they have rights to see
- 4 Powerful security, version control, user audit reporting
- 5 Addition of metadata to documents by using “Auto Tagging” folders

Distribute and Access

Features for the distribution and quick access to documents

Powerful Search - Search results are driven by the words in the document as well as the metadata associated with the document. The document management software has the ability to extract and search the content from all of your favorite file types including PDF, Microsoft Office, Zip and many more.

Web Browser Access - Users can easily access the document management software library using a standard web browser (Internet Explorer and Mozilla browsers supported).

Microsoft Office Access - E-mail can be stored in FileHold by a simple "drag and drop" activity that moves documents from Outlook into the appropriate folders. This provides a simple but powerful way to associate e-mail with relevant folders of information.

Microsoft SharePoint - FileHold can be installed as a web part of Microsoft SharePoint. Users can move documents between FileHold and Sharepoint.

Desktop Access - Power users can drag and drop documents to and from their desktop using the document desktop utility. The desktop client provides a quick and easy way to add documents en masse to the system.

Email - Send links to documents directly to team members, partners, suppliers or customers. File security is maintained as only authorized users are able to retrieve the file using the link.

Distribute Via Third Party Applications - The Web Services architecture and API allows for easy integration and distribution of documents with third party portal / ERP / CRM applications.

FastFind - Provides an instant search capability from 3rd party products such as accounting or GIS. Create a "hot key" to go directly from any windows forms application directly into the FileHold library to find relevant data instantly.

My FileHold Personalized Dashboard - acts as a launch pad to a users bookmarked list of documents, document change alerts, reminders, checked out documents, recently added or accessed and documents requiring approval.

Retain and Dispose

Features that facilitate the storage retention and disposal of documents

Active and Inactive Document Lists - Based on the document type, metadata, age and archive policies; documents are automatically designated as either active or inactive. Inactive documents may be automatically archived by the system.

Document Usage Logging - Tracks how and when documents are accessed by system users. Provides a permanent record (essential for regulatory compliance) of who has read, updated the document, updated metadata, transferred or deleted documents from the library.

Disposal Settings - Documents can be automatically deleted by the system based on disposition rules. Documents accidentally deleted by users can be quickly recovered.

Records Management - Records may only be deleted from the library in accordance with their retention/disposition schedules or by a designated corporate records manager. Users may retrieve copies of records but not the original records themselves. Changed versions of records added to the library will be designated as new records.



"My users give me unsolicited comments on how well FileHold is working."

... Manufacturing Customer

Document Metadata

Features for the centralized control of the metadata vocabulary

Controlled Vocabulary Management - For creation of a controlled metadata structure ensuring documents are classified in a way that is in-line with the company's business tasks and processes with unique metadata schemas for each type of document.

Guaranteed Metadata Capture - Ensures the mandatory amount of metadata is captured for each document or record. As new documents are added the user is prompted to classify the file using required metadata fields.

Document Naming Standards - Allows for the quick creation and adherence to corporate document naming standards. As documents are added to the library they are automatically renamed according to the naming policies set.

AutoTagging - Create "AutoTagging" folders that automatically add metadata to the documents as they are entered into the folder. Sometimes this is called Matter Centric filing.

Administration and Support

Hassle-free deployment, maintenance and support

100% Microsoft Based Solution - FileHold document management software is designed to integrate into your Microsoft Office or SharePoint environment ensuring you are able to fully leverage your existing technology investment.

Auto Deployment and Upgrades - All client side FileHold document management software utilities are deployed using install technology providing automatic delivery of upgrades with minimal impact to the users computer.

Active Directory Server Synchronization - Synchronize the document management software users or groups from objects in Active Directory or LDAP directory servers. Both users and groups can then be assigned to functional roles within the FileHold application.

Flexible Roles Based Security - The document management software ships with five pre-defined roles: Read Only users, Publishers, Publisher plus Delete users, Library Administrators and System Administrators.

Fast Setup and Configuration - The document management software is designed to be installed and configured in less than a day. FileHold fixed fee installation fee ensures control of implementations costs.

Unlimited Reporting - Based on Microsoft SQL Reporting services users can generate custom reports based on any metadata file ranges in the system – the ultimate reporting flexibility.

Simple licensing Upgrades - FileHold encourages users to start small and add features and users as needed. A FileHold document management software license can be updated in minutes via e-mail.

About FileHold

Product Upgrades

Ensure your FileHold software stays current in an evolving technology world. New document storage formats, new scanners and new operating systems are constantly introduced. Customers on FileCare receive all new releases of software.

Technical Support - For ongoing product support FileCare provides a program of "support case management" reporting and tracking with assured response times, severity classification and escalation processes.

Evaluation is Easy

Public Demonstrations - Attend a webinar of FileHold software; see for yourself how the paperless office can become a reality.

In House Trials - Ask for a no obligation trial of FileHold document management software in your own environment. We will guide you to solve your document storage business problem.

Pilot Projects - start small with FileHold Express and realize the benefits to a single user group before expanding across the enterprise.

No obligation Price Quote - Quick and easy just tell us how many users you have and a little bit about the business problem you want to solve.

FileHold Works with Partners

FileHold has a worldwide network of consultants, software vendors and hardware partners that have been trained to implement FileHold software. These partners may provide back file scanning services, systems configuration support, records management expertise and needed hardware that add up to a total "Paperless Office" solution.



"Our company chose FileHold document management software, to sell to our customer, after reviewing eleven other packages."

... Document Scanning Service Bureau

FileHold Products

FileHold "Enterprise" - For companies who have more than 10 users. Pricing is based on the frequency of use. Powerful features for organizations big or small who want to go paperless.

FileHold "Express" - The same features as Enterprise but priced for up to 10 users. The perfect solution for small companies or departments. Ships with 3 viewers and scanning software.

Microsoft Service Oriented Architecture:

scales to support thousands of users and millions of documents.

Scanning and Imaging:

support of software from all leading vendors to convert paper to electronic form.

Integration Friendly / Ready:

Published Web Services API and FastFind search from any application.

Secure and Compliant:

Robust security and a complete audit trail of every document activity by every user.

Architecture

