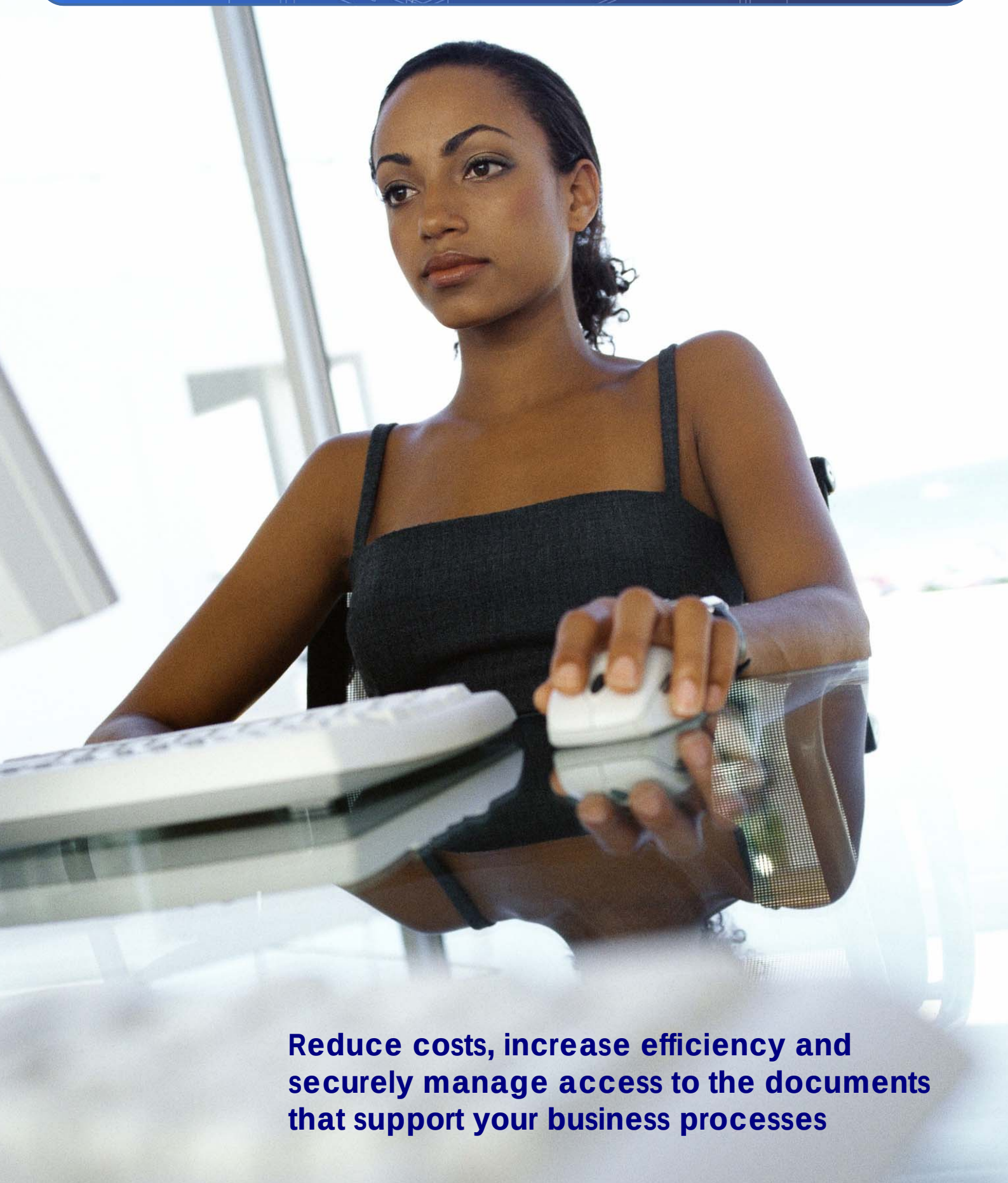
Spielberg

Document Management Made Easy

FileDirector®

enterprise



Reduce costs, increase efficiency and securely manage access to the documents that support your business processes

The Solution that tailors itself to your needs

Whatever the size of your business, implementing a document management solution will bring a host of benefits to it, giving you the competitive edge. FileDirector helps to improve your business, and allow you to offer your customers a higher level of service, whilst reducing costs and increasing productivity.

FileDirector is the future for the administration, and distribution of information, because it decreases considerably the time taken to manage and access all of the information within an organization.

On the one hand this happens by centrally storing your documents. On the other hand by referencing all information intelligently you can access the information faster, securely, at any time, via an Intranet or the Internet, in the way that best suits your business needs.

This is made easier by allowing every user to effectively manage their own information, including rapid capture, retrieval and distribution.

By using a flexible modular approach, FileDirector adapts with the changing demands of your business, no matter if you have five or five thousand or more employees.

FileDirector is your chance to bring business practice into the 21st Century.

Document Management Made Easy

Capturing information is easy in FileDirector. With support for thousand's of scanning and digital input devices, and with predefined Scan Profiles, scanning has never been simpler. FileDirector's MS Office Integration takes just a click of the mouse to capture documents, spreadsheets and email.

Viewing documents cannot be more straightforward. Just double-click on the document record, and it will be opened. FileDirector supports over 200 different file formats. You can easily page through, view thumbnails of it, and look at any previous versions of it, if it has been revised. You can also open and look at several documents at once.

Indexing documents can be done manually, or taken from the documents themselves by zoned OCR, full text OCR or barcode reading. Index data can be imported from other databases or files, or values can be automatically applied when importing or capturing documents. You can even have multiple index records pointing to a single document.

Process management allows you to send documents to users via a set of predefined steps, where each user or users must perform specific tasks, such as commenting or approving a document. An ideal tool for applications such as invoice processing.

Retrieving documents is a simple task. Type in what you are looking for into the index fields, and you'll get a list of documents back, which you can then view. Or use the full text search option, to find documents that contain the word or phrase you want to look for.

FileDirector supports up to 128 servers working in unison, and can cater for thousands of users, whether in the same office, town, country, or spread worldwide. It's unlikely you will outgrow FileDirector.

Compliance issues such as document access control, activity auditing, revision control, retention control, and automatic storage of emails are all easily achieved in FileDirector.

Storage is not a problem with FileDirector. Working with Microsoft SQL or Oracle, it supports multiple document storage schemas, and can easily handle millions of records and documents.

Capturing Made easy

Paper documents

FileDirector has capture capabilities included within the standard Client software, so there is no need to run one application for capturing, and another for retrieving. Also, Scan Profiles can be created, which hold the settings for the capture device, and can also be configured to store documents under specific categories. FileDirector supports thousands of input devices, with its support for ISIS, TWAIN and its integration with eCopy ShareScan, enabling you to send documents for your MFP directly to FileDirector.

Entering index information so that you can find documents later on can be a time consuming process, so Scan Profiles can be set to automatically perform Forms Recognition, reading information from the documents being scanned, and fill the index fields for that type of document automatically. In addition, index information can be automatically imported from other systems, and the documents could have full text recognition performed on them, so you can search for a document on its content. Also, index fields can be set for automatic values, such as dates, or counting fields.

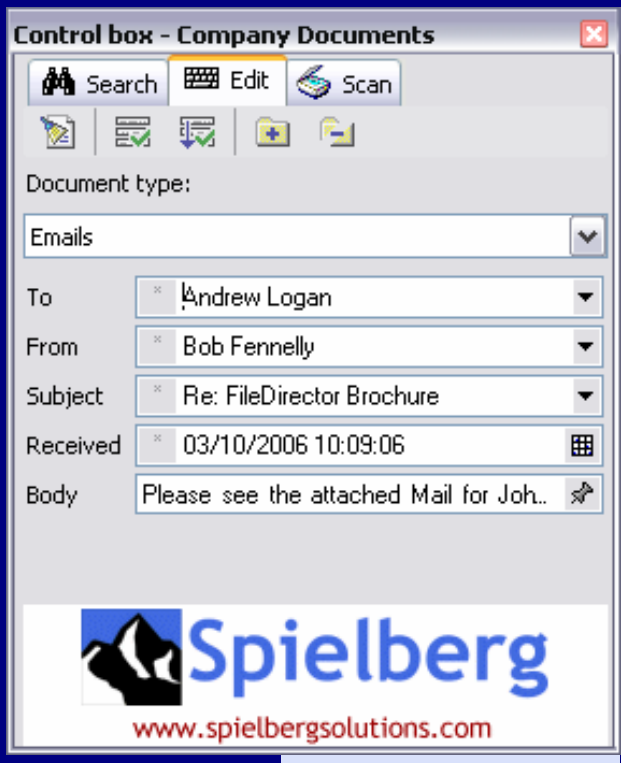
Electronic Documents

Why not store all your electronic documents in FileDirector. This is a simple process with FileDirector's integration with Microsoft Office applications and with Windows Explorer. Just choose to send the document to FileDirector, and you can then index the document, or have FileDirector take information, such as the file name and date automatically. When saving emails from Outlook, these can be indexed automatically, using the email data such as 'To, 'From', Subject' and even the email body.

If you need to save all your email traffic automatically, due to compliance issues, FileDirector's MailStore option will connect to your mail server, and then store all new emails to FileDirector.

FileDirector can also automatically import documents from specified locations, so all the files held there can be imported at one time. This can be server based, or user controlled.

You can even 'print' documents to FileDirector, using our Windows driver, which you can select just as you would any other printer, or you can use Virtual network printing, where you can create several printers, and have Forms recognition performed on the documents to index them automatically.



Most tasks can be performed from the WinClient toolbox

Working with Documents

Security

FileDirector works with Windows user accounts, so there is no need to maintain a separate user database.

What a user can see and do in FileDirector is down to the permissions they have been given. Documents are stored in Cabinets, which can be sub-divided into Document Types, and index fields are associated with each Document Type. A user can be given access to a Cabinet, but may not have access to all the Document Types within that Cabinet. Additionally, a user may be able to create and edit documents within one Document Type, but only view documents in another. Also, if an index field is set to one value, a user will be allowed to access the document, but if it is set to another value, then the user cannot access the document.

Finding Documents

You can search across a whole Cabinet, or just within one Document Type for the information you are looking for. Just use the index fields that have been defined within the cabinet, and these can be set to do specific match searches, or wildcard and range searches. Or you can use the full text search option to find the documents you want, based upon what they contain.

The documents that are found that match the criteria you set will be shown in a list, which can be sorted and filtered. On this list, just double-click on the document you want to see, and it will be shown in the document display window.
FileDirector also includes retrieving documents using just a web browser.

FileDirector supports over 200 different document formats, so the likelihood is that you will be able to see the document, without having the application that created it installed on the workstation.

Editing Documents

Before a document can be edited, it will be checked-out, which means nobody else can edit it at the same time. Also, when the document is checked back in after having been changed, the updated document is stored as a revision, and any revision of a document can be viewed.

A document in FileDirector can contain a mix of image and electronic documents (eg. Word) pages and any page can be edited. You can also insert, append, replace or delete pages.

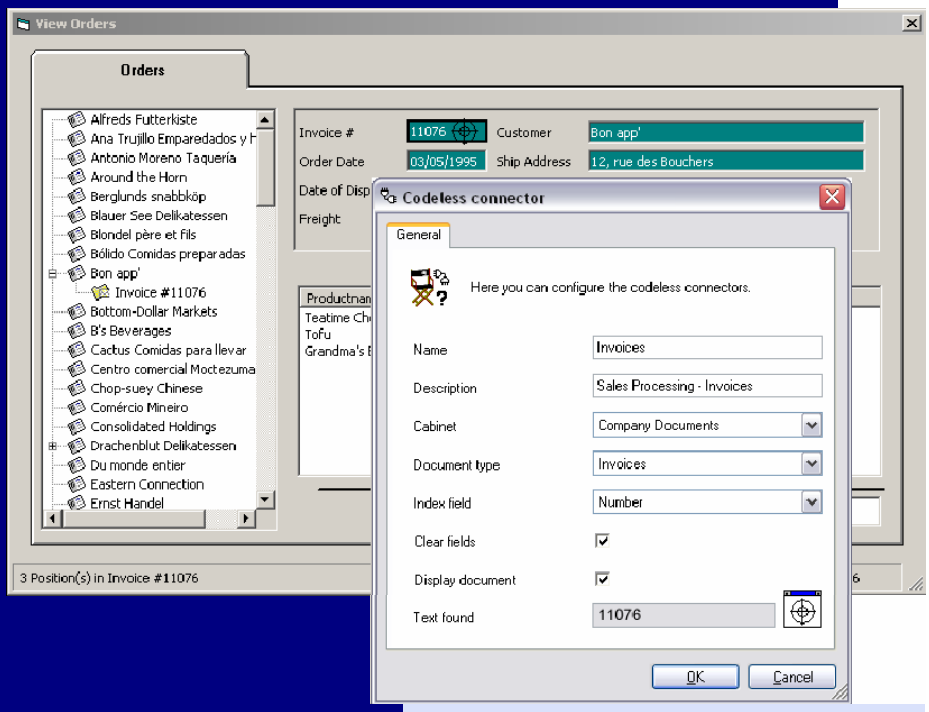
If you are editing an electronic document such as a Word document, you must have the original application that created it. You can open the document in the original application, and once you start making changes to it, it will be automatically check-out in FileDirector. It can then be automatically saved back to FileDirector as a revision.

On image pages, you can apply annotations, such as highlighting an area, or putting a stick-note on the page. You can even create hyperlinks on the page.

Integrating

Codeless Connector

The FileDirector Codeless Connector allows you to easily ‘document enable’ third-party applications, by creating links between data fields in FileDirector and the other application. Once done, from the other application you can search for documents, edit index data in FileDirector, and even tell FileDirector to scan documents, passing over the index data. All this, with not a line of program code required.



In FileDirector Codeless configuration, just drag the crosshair to the 3rd party application data field that you want to link, and its done.

Web Integration

Integrate FileDirector browser retrieval functionality into your intranet, or even your corporate web site. This is an easy task with FileDirector's web retrieval engine which is fully customizable, and can be set to require, or not require security credentials from users, although the documents available can be tightly controlled.

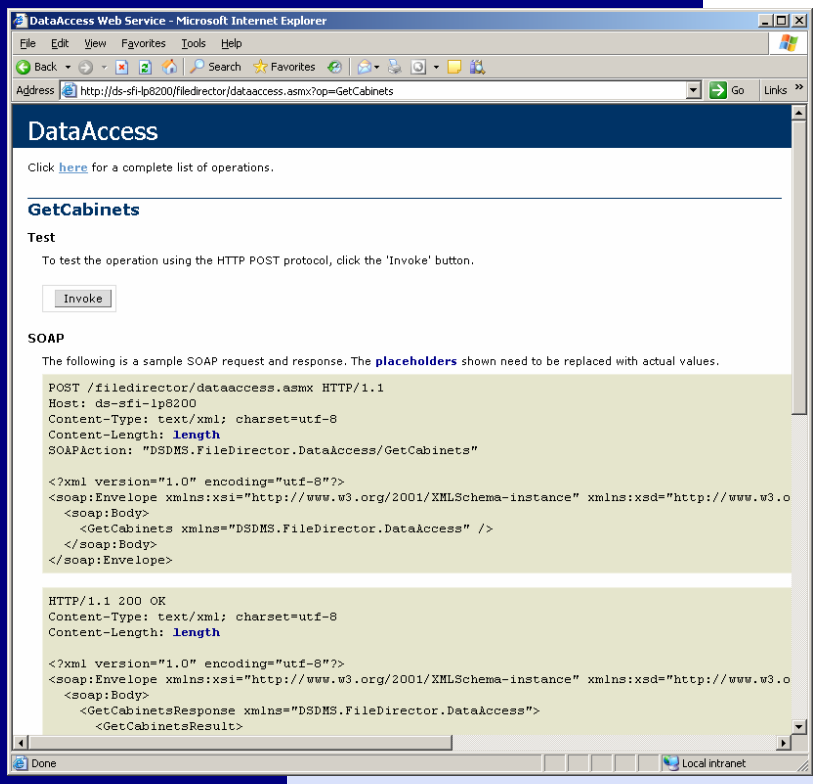
Integrating

SAP Certified Integration

Need a Content Server for your SAP solutions? FileDirector has SAP® Certified integration with SAP NetWeaver® , and offers these functions: SAP HTTP Content Server 4.5, OLE/HTTP Front end and Barcode BAPI.

Built-in SDK

If you develop, or have your own applications developed for you, whether Windows or web based, then the FileDirector SDK will allow you to fully integrate with FileDirector. Create new documents, update them, retrieve them, manage security and more, the fully documented development kit makes this easy.



FileDirector is an IIS Web Service, and publishes its command set, so you can easily integrate with your own applications.

SAP® Certified Integration

Capabilities Summary

- Intranet / Internet transparency
- Scalable from 1 to 128 Servers
- Microsoft SQL or Oracle database
- Active Directory/LDAP based security
- Flexible and simple administration of rights
- User-defined Metadata design
- Windows & browser clients as standard
- Windows Client customization
- Browser customization
- Supports thousands of scanning devices
- Microsoft Office Integration
- ImagePrinter
- Viewer supports over 200 formats
- Check-In/Check-Out control
- Document Revisions
- Online/Offline working
- Full audit logging
- Document Retention Control
- Document Annotations, including hyper-links
- Linked Document References
- Server-based ODBC links
- Built-in documented SDK
- MailStore Automatic Email Storage
- Codeless application linking
- SAP Certified Integration
- Forms Recognition
- Zone OCR indexing
- Full Text OCR
- Process Management

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