Document Contents:

Standard Features

Optional Features

Document Scanning and Imaging

Images For Applications

Standard Features

FileHold delivers essential, document, records and workflow management. Following is a brief description of the many standard features that come with the software:

- **Web Access -** FileHold software can be accessed from anywhere in the world via a web browser. Multiple browsers are supported and all functionality is available including system administration and library administration.
- **Mobile FileHold** – Manage your documents while out of the office with the easiest mobile document management software you will ever use.
- **Search -** Search documents from a simple Google-like search or an advanced search using metadata. Save the searches to create reports whenever you need them.
- **Document Viewers** – A FileHold Level 1 viewer comes with every registered user license and allows users to see an image of a document without the need to have the native software installed on their computer the viewers work with both the web client and the desktop application.

- **Microsoft Office Integration -** Tight integration with Microsoft Office is provided that gives direct access from the document software to: Word, Excel, Outlook, PowerPoint and Visio.
- **Records Management Software -** Manage both short and long term working and archived documents. Advanced Record retention and disposition policies for both electronic and paper based records are standard in the software. Document, data and usage history is fully captured to stay in compliance.
- **Electronic Forms (e-Forms) –** Metadata information can be extracted from electronic forms created using the standard Microsoft Word tools found in Office or PDF forms. Once created the form data can be automatically extracted into FileHold metadata when the form is added to the system.
- **Courier –** FileHold Courier allows you to transmit documents for viewing or approving to people inside or outside the document management system. Courier is a "proof of delivery" system where unlike email it is a secure method of sending documents. With email there is no way to know if the documents ever arrived or if the attachment could be opened by the recipient. With Courier, recipients are notified by email containing a secure link which is then fully tracked and logged in FileHold.
- **Calendar** – Differentiate your daily tasks and become more proficient at accomplishing your document management goals using the FileHold calendar.
- **Document Version Control -** Document version control software provides: check in / checkout ability preventing documents from being overwritten or deleted as documents are updated by more than one party. All versions of a document are maintained by the software.

- **Document Scanning and Imaging -** FileHold ships with [scanning and imaging software](#) that support over 300 different scanners types to allow organizations to "go paperless". Basic and advanced third party scanning software is supported for both simple and complex document scanning operations.

- **Check Documents Out / Check Documents In -** Users are able to check in and check out documents from the software from within Microsoft Office applications, using the Desktop Application or from anywhere in the world using the web interface.

- **Document "Tagging" or Metadata Capture -** [Capturing metadata or "tagging"](#) (key data about the document) is the key to successful search and document organization. The software has easy to use controlled document tagging insuring documents are classified.

- **Virtual Folders -** The [Virtual Folders](#) feature in the software allows limitless aggregation of documents throughout the library into personal "views". A Project Manager might have a virtual folder containing project documentation, project legal contract documents, invoices, design documentation and emails even though each document is stored in different locations of the library.

- **Language Packs -** FileHold offers two [language packs](#) as standard features: French and Spanish. The user interface can be translated into any language by customers or partners. Some languages that have been translated by customers include Polish, Arabic and Chinese.

- **Work Offline** - If you are traveling or out of the office and are not connected to the FileHold document management server, you can still [work on your important documents offline](#). The software will recognize the document changes and can be synchronized with the Library once you are back online.

- **Document Linking -** [Document to document linking](#) builds parent or child relationships between documents and allows users to link and organize documents in logical groups. Linking provides the ability to create document shortcuts to documents frequently needed.

- **Optical Character Recognition (OCR) and Indexing -** Using the scanning software that ships with the paperless office software users can convert the text on typed paper documents into editable and searchable information using [Optical Character Recognition](#) (OCR). The information that is zonally OCR'ed can be imported into the metadata fields of FileHold.

- **Matter Centric Filing (Auto Tagging) -** [Metadata is automatically applied to a document](#) when being added to a specific destination folder. Matter Centric filing is a feature / term commonly used in the legal industry.

- **User Roles and Security -** FileHold ships with a choice out of 11 different [user security roles](#) ranging from "read only" to "System Administration" to provide an appropriate level of

user access permissions for workers at all levels. Users see only documents that administrators want them to see. To learn more about How FileHold solves the user security business problem go to: business problem solved securing access to documents.

- **Watched Folders -** FileHold software can be configured so that certain folders on the local computer or network are "watched" by FileHold and then automatically moved into the library. The documents imported into FileHold by the watched folder functionality can be automatically tagged and destination folder pre-configured.

- **Ease of Use -** The FileHold filing structure mirrors the physical office filing environment. Document cabinets contain drawers that contain folder groups and or folders that contain documents. This familiar document filing approach ensures that users can easily browse for documents in a logical and efficient fashion.

- **User Audit Logging and Tracking -** FileHold tracks and records every user activity to ensure a complete audit trail of document activity in the software. This document auditing capability ensures compliance and protects intellectual property.

- **Email -** Email documents via attachments or links.

- **Document Subscriptions -** FileHold software allows users to subscribe to and to be notified of edits to documents or changes to folders they have subscribed to. When an existing document is updated or a document is added to a folder, the user receives email notification that the change has occurred, who has changed it, and receives a secure link to directly access the document.

- **Document Naming Standards -** The software can be configured to automatically create document names to enforce adherence to document or record naming conventions.

- **Third Party Integration-** A well documented Web Services API allows direct integration with third party applications and flexible integration with existing back office systems. These **web services** are available to third parties to provide easy integration with other enterprise solutions and productivity applications.

- **URL Support -** Provides the ability to send a secured link to a document, rather than emailing the document and cluttering up the mail inbox. This link can then be clicked on to launch the Web Client or Desktop Client to work on the document in a few seconds.

- **Document Control Numbering -** This feature provides for the automatic application of document control numbers to documents.

- **Reporting and document Compliance -** FileHold comes with many built in reports to give administrators information about the usage of documents and users.

- **FIPS Compliance –** FileHold is FIPS-140 (US Federal Information Processing Standards) compliant. The US Federal Government requires compliance in order to meet security and interoperability standards. Licenses and passwords are encrypted using a FIPS-140 compliant algorithm to meet full compliance.

Optional features

- **Document Workflow** – Fully automated document review and approval workflow for documents needing to be routed through several authors, reviewers and approvers before being ready for general distribution. Workflow description and the workflow video tour.

- **Active Directory Integration (Single Sign On) –** User permissions and roles can easily and frequently be synchronized with Microsoft Active Directory users and worker groups. It can also be populated with users that do not reside in Active Directory (are not domain members). Synchronization is best done at the time of the initial deployment. Active Directory Synchronization has a fixed fee and includes professional services support.

- **Electronic signature - Adobe Sign** is a part of the FileHold workflow and approval process with documents stored in the library. When a document, such as a contract requires a signature they can be transmitted to Adobe Sign directly from the FileHold workflow task. Once the agreement is signed, Adobe sends the signed documents back to the FileHold server. The signed documents are checked into FileHold as new versions of the originals and the workflow task is completed.

- *FastFind* **Search Function** – *FastFind* allows users to establish "hot key" links from third party applications to the document repository. This "hot key" allows users to find any document stored within the document library with a single key stroke.

- **Print to FileHold integration tool** – Print to FileHold allows users to convert documents to a PDF and send your files to the document library using the a virtual printer functionality. This allows users to store documents directly into the document library from any application that supports the print function.

- **Server Side OCR** – The FileHold server side OCR feature can provide OCR (optical character recognition) for PDF and TIFF documents so that they can be indexed and searched without the need of using scanning software to process the documents.

- **Level 2 Document viewers** - For customers who already have level 1 viewers and want more advance functionality the Level 2 viwers are offered. Level 2 viewers provide Annotations and markup features as well as high fidelity rendering for DOCX and similar files.

- **Electronic Signatures –** The ability to add electronic signatures to documents such as legal agreement makes the document management software even more powerful. This is accomplished through a partnerships with manufacturers of electronic signature software such as Adobe Sign.

- **Custom Document Naming and Number Sequencing** - The ability to name documents in custom ways and add auto sequencing numbers for version control and easy document identification.

- **Microsoft SharePoint** – Use FileHold as a web part of Sharepoint. The software offers integration for SharePoint to users who want to implement the Paperless Office but need tools that are not inherent in SharePoint. Features such as: document scanning and imaging with OCR supporting all scanner types, viewers, document approval, document numbering, version control and 3rd party integration tools such as *FastFind* all in a single package. To see an independent consultant's review of FileHold software and SharePoint

integration read the [Microsoft SharePoint and Integration with Content Management Platforms Whitepaper](#).

FileHold can also be an [excellent replacement for SharePoint](#) for those who want a more focused DMS. Read an interview with the FileHold CTO about how FileHold compares to SharePoint [http://www.bradegeland.com/blog/filehold-document-management-software-with-workflow-and-approval](#) .

- **Limited Registered or Portal Alias Account Users** – For customers who may want a large number of users to look at documents on a "read-only" basis the software offers a [Limited user account](#) feature. In limited accounts users can share a common user ID and have access to common documents.

- **Anonymous Portal** – Create a customized portal for external and internal access to the document repository without the need to login or have a full registered license. Workers can view documents in "read-only" mode and only see those documents to which they have permission. The [Anonymous Portal](#) is used in conjunction with limited register and portal alias user accounts.

- **Multiple Document Repositories** – Increase document storage capacity by adding [multiple repositories](#) (hard drive space) to improve the scalability of the document management software to accommodate even greater number of documents being stored.

- **Automatic Document Importation** – Allows importing a large number of documents into the document management system with minimal user intervention. It runs on the FileHold server to facilitate the mass migration of documents. ADI is similar to the Watched Folders functionality but can also be integrated with various custom migration tools using an API.

- **WebCap** – [Remote users can scan](#) and store documents into the document management repository from anywhere they have access to the internet. This feature appeals to organizations that have many remote offices or many mobile workers who need to scan documents such as contracts, bill of sales, expenses, or work estimates into FileHold.

- **Non-production Licenses** – Two types of reduced cost licenses are available for non-production requirements such as supporting multi-tier IT staging environments.

  - **Test License** – This option is for organizations that want to experiment with new configurations, work with the FileHold API, test document migration or scanning technologies, etc. The option includes 10 registered users and 5 concurrent sessions and all the same options as on your production server (excluding third party components). It is available for Express and Enterprise customers.

  - **Backup License** – Certain IT functions require a non-production license with an exact match for the users and concurrent sessions of the production license. This license is available to FileHold Enterprise customers (20 registered users or more). Third party components are not included, but they can be moved from the production license to the backup license if needed.

    - **Cold Backup Server** – FileHold software is highly stable, but the physical and virtual servers that FileHold relies on do fail. A cold backup server replaces the production server at a time of production server failure. An organization can quickly restore their production data on the backup

server and return to full operation. FileHold professional services are available to assist in configuring a cold backup solution.

- ▪ **Non-production Application Server** – These servers can be used for everything from simple backup and restore testing to user training to [formal change control]. See our [FileHold Server Backup and Recovery Guide] for more information about best practices in backing up data.

- **Language Localization -** The user prompts in the software can be [localized into different languages]. The conversion work is typically done by the customer using the resource files that are provided who understands the language best.

- **Rebranding to customize the "look and feel -** [Rebranding] the logos and color scheme within the Web Client is available out of the box to customers. More elaborate customization to the web client and the desktop application can be made by FileHold developers to provide a unique look and feel that matched a customers or re-sellers exact requirements.

- **Document Auto Filing -** Documents can be [automatically filed] into a destination folder based on a script configured on the FileHold server. This saves time so users do not have to do this as a manual process.

- **Integration with other Applications** - The [Web Services API] is available at no additional charge. Complete documentation is provided to developers who want to provide direct data base integration with other applications.

Paperless Office Software Benefits For Managers

FileHold software benefits business managers looking to improve the efficiency of their company, department or business unit through a paperless office solution. Document management systems reduce the amount of paper and subsequently the costs associated with the management of paper based systems.

1. **Increased Employee Productivity -** accessibility to data across business lines dramatically improves employees' decision and reaction times. The result is decreased operating costs and faster time to market for products or services.

2. **Tangible ROI** -improving the efficiency of your team or department through improvements in employee productivity by using paperless office procedures ensures the return on your software investment is significant and cost effective.

3. **Connecting Islands of Data** - Document management software allows a business manager to consolidate and connect islands of documents and data that may be littered across their internal (LAN or WAN) networks. Bringing these islands of information into one place results in a more effective workforce as users need only look to one location to find the information they need.

4. **Increased customer satisfaction -** provides customers, partners, suppliers, distributors, resellers and other 3rd party's access to relevant documents to keep them satisfied.

5. **Employee Enablement** - The paperless office software gives employees access to tools and data through a web interface allowing them to retrieve critical working documents wherever and whenever they need them. For example, the document management server can act as a central library providing current information about employee benefits, policies, and payroll in a place where employees can find it easily.

Document Scanning

FileHold Software supports any TWAIN document scanner "out of the box" from the industry leading vendors. Learn more about document scanning. *This technical glossary of terms, is a resource for organizations who may want to add scanning to their document management software. This may be especially helpful for those considering the conversion of an existing archive of physical records into an electronic record repository. Learn more about how to own records management software.*

Anti-aliasing - A process used to remove the stair stepping effect found in diagonal lines of an image. It involves inserting dots of an in-between tone along the edges.

Aspect Ratio - The relative proportion of the length and width of an image. For example, if you scan an original that measures 4 by 6 inches, it will have an aspect ratio of 4:6, or 2:3.

Attribute - Characteristics of a page or character, such as underlining, boldface, or font that can be captured by an optical character recognition (OCR) program.

Automatic Document Feeder (ADF) - A device attached to a scanner that automatically feeds in one page at a time, allowing the scanning of multiple pages.

Auto Trace - A feature found in many object-oriented image editing programs, such as Adobe Illustrator, that allows you to trace a scanned image and convert it to an outline or vector format.

Batch - Actions carried out consecutively on a set of files.

Binary - Base-two arithmetic, which uses only 1's and 0's to represent numbers. 0001 represents 1 decimal, 0010 represents 2 decimal and so forth. Binary numbers are used indirectly to refer to color depth, as in 24-bit or 8-bit color.

Bit - The abbreviation for binary digit, either 0 or a 1. Scanners typically use multiple bits to represent information about each pixel of an image.

Bit Depth - The number of bits used to represent colors or tones.

Bitmap - An image represented as pixels in a row and column format. (Note that Adobe refers to a bitmap as a two-color image.

Calibration - A way of correcting for the variation in output of a device such as a printer or monitor when compared to the original image data from the scanner.

Carriage - The scanner component that moves down a page to capture an image.

CMYK - The abbreviation for cyan, magenta, yellow, and black.

Compression - Squeezing a file (especially an image) into a more efficient form to reduce the amount of storage space required.

Contrast - The range between the lightest and darkest tones in an image. In a high-contrast image, the shades fall at the extremes of the range between white and black. In a low contrast image, the tones are closer together.

Data Compression - A method of reducing the size of files, such as image files, by representing the sets of binary numbers in the file with shorter string that conveys the same information. Many image editing programs offer some sort of image compression as an optical mode when saving a file to disk.

Digitize - To convert analog information, such as a continuous tone image, to a binary form that can be processed by a computer.

Dot - A unit used to represent the smallest element a printer can image, but sometimes used to represent the resolution of other devices, such as monitors or scanners.

Dots Per Inch (DPI) - The resolution of a printed page, expressed in the number of printer dots in an inch, abbreviated dpi. Scanner resolution is also expressed, somewhat in accurately in dpi.

Down sampling - To reduce the amount of information in an image, usually to make it smaller or to discard some colors when changing bit depth. Also used when reducing the number of pixels in an image.

Dynamic Range - The range of densities between the highlights and shadows of an image.

Export - To transfer an image to another format type.

Filter - An image transform tool used to process an image; for example, to sharpen, blur, or diffuse it. Often this is a plug-in in an image editor, but filters are also built into scanning software or hardware.

Gamma - A way of representing the contrast of an image, shown as the slope of a curve showing tones from white to black.

Gamma Correction or Gamma Compensation - The process of preconditioning or adjusting an image to correct for the gamma of the device used to reproduce the image, such as a printer or display screen. Without gamma compensation, the image will look too dark when printed or displayed.

Gang Scan - The process of scanning more than one picture at a time, used when images are of the same density and color balance range.

Graphics Interchange Format (GIF) - A compressed image format popular on the Web. GIF was the first commonly used image format, but was largely replaced by JPEG.

Grayscale - Gray values in an image.

Halftoning - A method of representing the gray tones of an image by varying the size of the dots used to show the image.

Interpolation - A method of changing the size, resolution, or colors in an image by calculating the pixels used to represent the new image from the old ones. It is also being used to increase bit-depth claims on scanners (as in "Enhanced Bit Depth" or "Enhanced Color").

Invert - To reverse an image's tones to its opposite value: to make a negative.

Joint Photographic Experts Group (JPEG) - The JPEG format offers a compression scheme that makes the image file smaller than files in other formats by discarding some of the image information.

Landscape - The orientation of a page in which the longest dimension is horizontal.

Legal size - Paper or other media that is 8 1/2 inches wide and 14 inches long.

Moire - In scanning, an objectionable pattern caused by interference of halftone screens, often produced when rescanning a halftone and the sampling frequency of the scanner (spi) interferes

with the halftone or dither pattern of the original.

Monochrome - Having a single color. Typically refers to a black and white image, but could be any single color image.

Noise - Random information that distorts an image, especially the background distortion of an analog image before it is converted to digital format.

Optical Character Recognition (OCR) - The process of converting printed characters into the ASCII characters and other attributes of a bitmapped image of text.

Optical Resolution - The resolution of a scanner that is calculated by dividing the width of the scanned area by the number of pixels in the CCD. Optical resolution is also often called true resolution and does not include any interpolation to increase pixels.

Pixel - A picture element of an image that refers to a single dot with in a digital photograph. A photograph is made up of thousands of pixels.

Pixels Per Inch (ppi) - The number of pixels captured per inch by a scanner. This is a more accurate rate term than dpi (dots per inch) when applied to scanners because scanners capture pixels.

Portable Network Graphics (PNG) - A loss less file format created to overcome deficiencies of the Graphics Interchange Format (GIF), such as the limited number of colors.

Portrait - The orientation of a page in which the longest dimension is vertical.

Preview Scan - A preliminary scan that can be used to define the exact area for the final scan. A low- resolution image of the full page or scanning area as shown, and a frame of some type is used to specify the area to be included in the final scan.

Raster Image - An image defined by rows and columns of pixels. Scanners capture images as raster images, although some can convert them to vector images.

Raster to Vector Conversion - The process of examining a raster image for lines and strokes, and creating a new image that looks the same but is made up of lines rather than pixels. When a person draws, they are creating a vector image. Vector images can be enlarged much more accurately and often have a smaller file size.

Resolution - The number of pixels or dots per inch in an image. Also the capability of a scanner to resolve detail, which requires quality optics as well as high ppi or spi.

Sample Rate or Samples Per Inch - The number of pixels per inch captured by a scanner.

Scanner - A device that captures images or text and converts it to a bitmapped image.

Selection Area - The part of a HP Deskscan preview scan that you select to be saved to a file or sent directly to a printer.

Sharpening - Increasing the apparent sharpness of an image by increasing the contrast between the adjacent tones or colors.

Smoothing - To blur the boundaries between tones of an image, usually to reduce a rough or jagged appearance.

Threshold - A predefined level used by scanners to determine whether a pixel will be represented as black or white.

Thumbnail - A miniature copy of a page or image, which gives you an idea of what the original looks like without having to open the original file or view the full size image.

Tagged Image File Format (TIFF) - A graphic file format originally developed specifically for scanners. It can be used to store grayscale and color images and now is graphic standard image file format supported by most applications, printers, and scanners.

Transparency Adapter - An add-on device used with a scanner to scan slides and other see-through media.

TWAIN - A software driver interface between a scanner and other image capturing devices that lets you scan images from a scanning application directly into an application like Adobe Photoshop.

Vector Image - An image defined by the beginning and ending points of each line.

Zoom - To enlarge a portion of an image.

Images for Applications
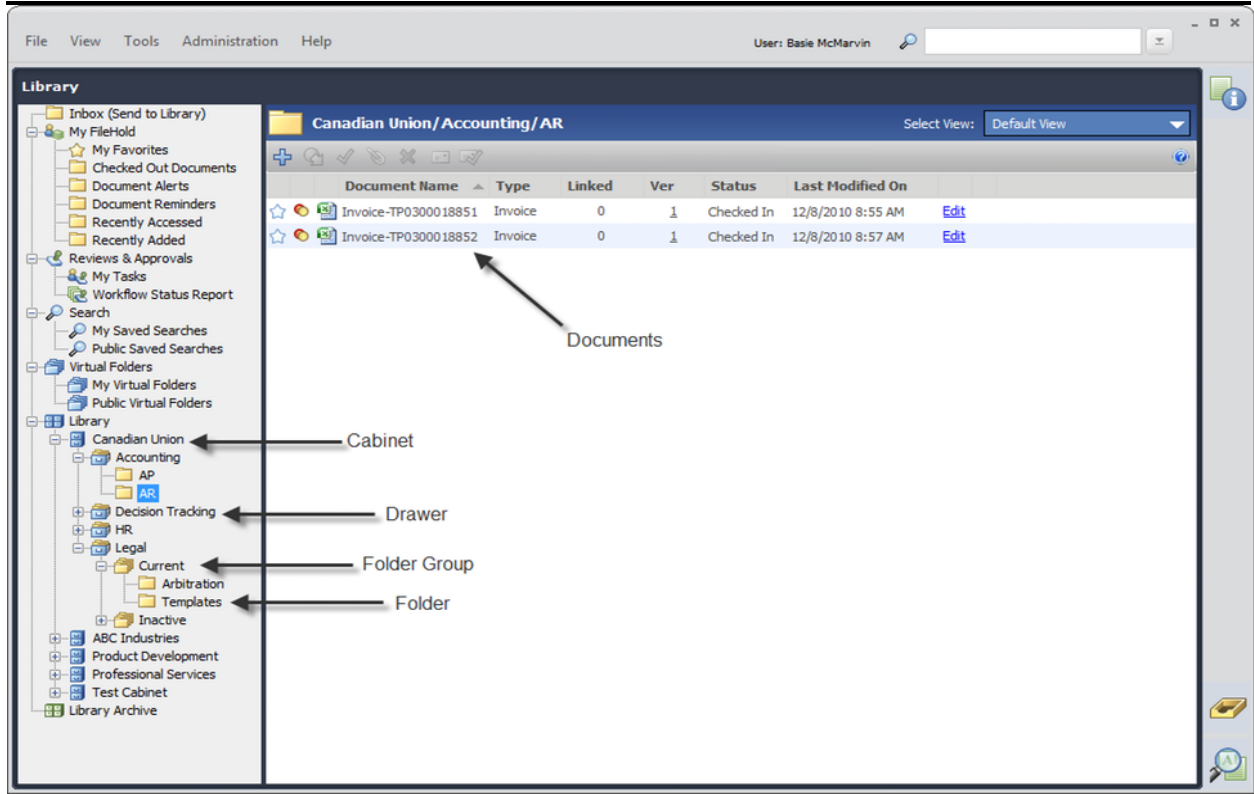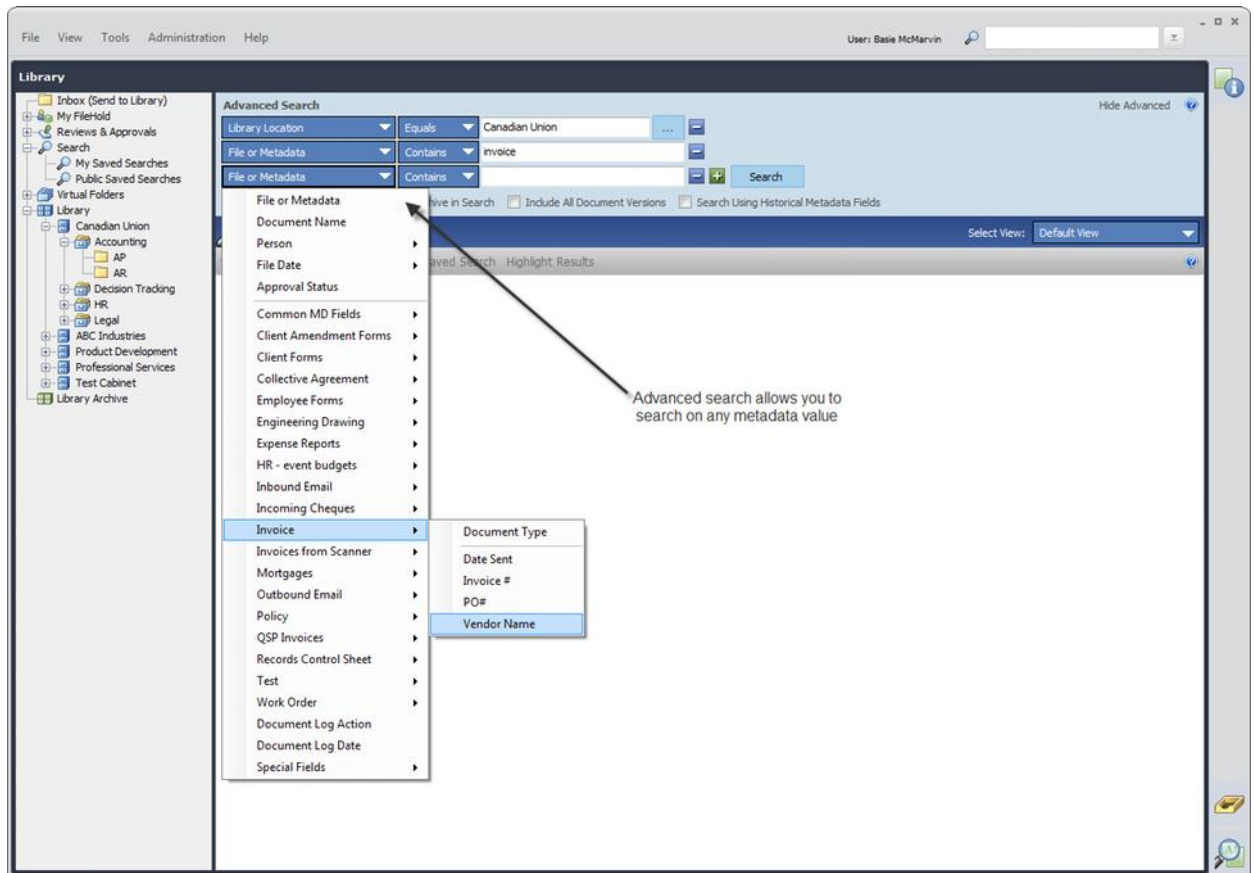
HolidayPartyBudget - Add Document to FileHold

Library
  Canadian Union
    Accounting
      AP
      AR
    Decision Tracking
    HR
      2010
    Legal
      Current
        Arbitration
        Templates
      Inactive
  ABC Industries
  Product Development
  Professional Services

Document Name ▲	Type	Linked	Ver	Status	Last Modified On

Select location for file

HolidayPartyBudget

Metadata

Type: HR - event budgets   Project Code *: Code 1

Event date *: ☑ 01/08/2011   Notes:: Holiday party budget

Enter metadata for file and select options below

Add Document Options

☐ Close this document before I add it

☐ Delete the local copy of this file after it has been successfully added

☐ Email notify all folder members that this document has been added to this folder

Add   Cancel

FileHold Library

Documents in the library

SharePoint integration

← C localhost/FH/FileHold/WebClient/AdminStatusReportForm.aspx

FileHold

System Admin Library Admin User: sysadm sysadm | Help | Log Out

- Manage Schemas
  - Document Schemas
  - Metadata Fields
  - Control Fields
  - Events
- Library Settings
  - General
  - Document Viewer Config
  - OCR Status
- Search Engine
  - Settings
  - Status
  - Unindexed files
  - Errors
- Workflow
  - **Status Report**
  - Templates
  - Dashboard
- Library Utilities
  - Check-in for User
  - Change Document Owner
  - Change Cabinet/Folder Owner
  - Recover Documents
  - Document Usage Log
  - Audit Log

Restart Workflow Cancel Workflow Rename Workflow Clear Completed Clear Cancelled Reserve/Undo Reservation Override Task Delegate Task

Reviews & Approvals Status Report

- Workflow Status Equals   In Progress ▾
- Completed Between   0   % and 100   %
- Date Started   From 6/29/2014   To 6/29/2014
- Due Date   From 6/29/2014   To 6/29/2014
- Document Name Contains
- Workflow Name Contains
- Initiator is   Andy Dwyer ▾

Apply Filter

← C localhost/FH/FileHold/WebClient/WorkflowTemplateForm.aspx?workflowId=1

FileHold

System Admin Library Admin User: sysadm sysadm | Help | Log Out

- Manage Schemas
  - Document Schemas
  - Metadata Fields
  - Control Fields
  - Events
- Library Settings
  - General
  - Document Viewer Config
  - OCR Status
- Search Engine
  - Settings
  - Status
  - Unindexed files
  - Errors
- Workflow
  - Status Report
  - Templates
  - Dashboard
- Library Utilities
  - Check-in for User
  - Change Document Owner
  - Change Cabinet/Folder Owner
  - Recover Documents
  - Document Usage Log
  - Audit Log
- Automatic Document Importation

Edit AP Invoice Workflow Template

Allow Initiator to Define

Workflow Name *	AP Invoice	✔
Description		✔
Used in Schemas	AP Invoice	

☐ Initiator can modify this workflow (add/edit or delete activities) at initiation.

☑ Hide the document version until the workflow is approved. ✔

Email notification ☐ Notify 1 days and 0 hours before for tasks that are going to be overdue. ✔
☐ Repeat notification every 24 hours

Observers Cabinet Administrators, Document Editors, Document Publishers, Editors, Library Administrators, Organizers, Organizers & Delete, Publishers, Read Only, Senior Library Administrators, System Administrators ✔

☐ Allow document version owner to observe the workflow

Workflow Activity 1   Review ▾ 1 ▾ ❌

Leslie Knope

Reviewers * ☑ Include document version owner
☑ Include workflow initiator
☑ 1 of X
☐ Force reservation
☐ Allow Check Out   ✔

Due By *   1 days and 0 hours after workflow initiation   ✔