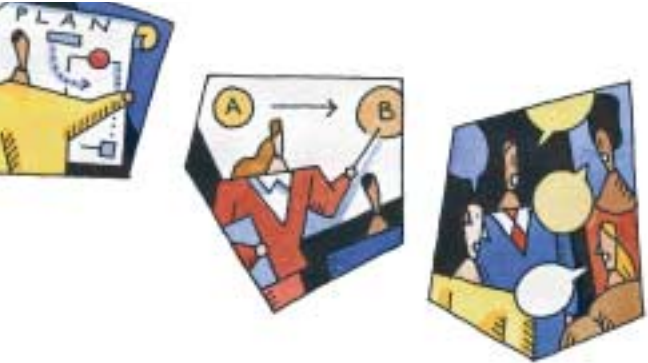




FILEstream

DOCUMENT MANAGEMENT SYSTEM

capture ▶
index ▶
store ▶
retrieve ▶
manage ▶



happy at work

FILEstream



what is document management ?

Document Management is a computerised document organising system for both electronic and paper files. Conventional computer documents and paper filing can be replaced with a responsive, interactive, electronic virtual filing cabinet that performs with far greater efficiency. Five easy steps are all it takes to streamline and control your electronic and paper documents.

1 capture

SCANNING AND FILE IMPORT Accessible scanning technology now makes the transfer of paper documents into a computer fast, efficient and easy. Also, the import of existing electronic documents (MS Office, CAD...) is effortless.

2 index

FILE CLASSIFICATION Indexing, using customised templates, creates an organized, well structured filing system and makes future retrieval simple. A well thought out indexing structure within FILEstream will be significantly more effective and versatile than existing manual procedures and systems.

3 retrieve

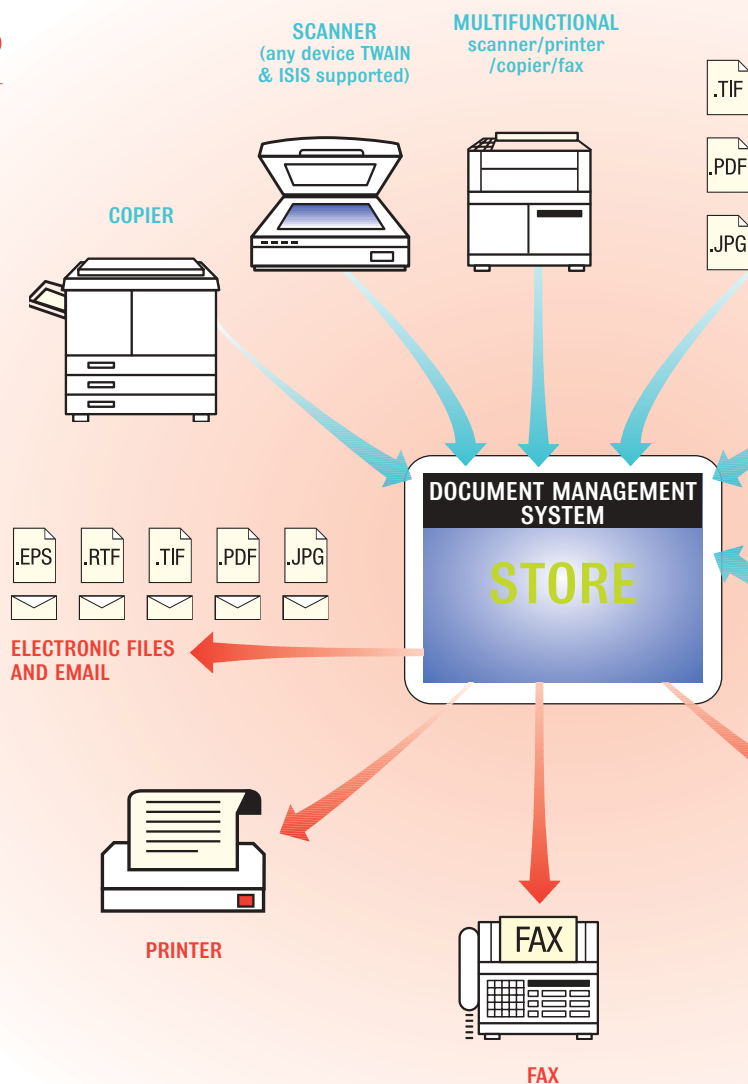
SPEEDY RETRIEVAL Find documents quickly by searching for files using allotted index names (or parts of) or text within the document. FILEstream has many powerful features to aid searching for individual or groups of documents.

4 store

INTELLIGENT ARCHIVING Long-term and reliable document storage is one of the first benefits of implementing a Document Management system. As a limitless archive, it accommodates growth and advancing technology.

5 manage

ADMINISTRATION AND SECURITY Which documents can be read and what actions performed on them is dependent on the user permissions granted by the system administrator. Document storing, indexing and viewing should be readily available to individuals or groups of people. However, flexibility to control access to the system is essential to safeguard the files within it.





economy of effort

the comprehensive document managing solution



a solution for all

why FILEstream?

general flexibility

Most Document Management systems are restricted to one or few active indexing stations unless extra costs are incurred. However, FILEstream is based on a more flexible approach. The system administrator can allow any number of users, logged on anywhere on a network, to not only search for but also import and index scanned documents and computer files

personal user inboxes

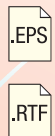
- ▶ all users have their own inboxes allowing electronic control of their own paperwork.
- ▶ documents scanned in via any network scanning device can be routed to a user's inbox using readily available routing software
- ▶ a 'new documents received' alert will appear on the user's PC
- ▶ the inbox feature facilitates files and documents within the system to be sent between users, rather like an internal email system. At any stage, scanned documents can be annotated – invaluable for any requiring authorisation or further instructions
- ▶ security is maintained as each annotated or amended document can be saved as a revision of the original, thus versions can be easily tracked. The integrity of the original Document is maintained

what are the benefits?

Paper and PC generated files received from any source can be incorporated into one system. They can then be viewed or actioned by any user or users simultaneously across a network. The ability to share documents has several advantages:

- ▶ inter-departmental queries are resolved more effectively by reducing the time and physical effort required to communicate and move between departments
- ▶ when talking to customers, questions can be answered instantly, as information such as that required for specifications and price lists can be made available from the screen without leaving the desk
- ▶ no more lost or mislaid files
- ▶ powerful filing flexibility – the same document can be filed under several references, not possible with paper documents or normal computer files unless copies are made
- ▶ the need to print or copy documents reduces dramatically, saving time and money
- ▶ freeing expensive floor area can result in large cost savings as space becomes available. Further desks or new equipment can be added without having to consider larger premises
- ▶ once existing paper files are archived into the system they can be disposed of, eliminating the need for off site storage facilities, which are expensive and impractical

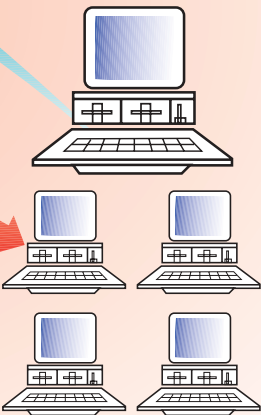
200+ FILETYPES



BARCODE



INPUT
electronically over a network
using Windows Explorer



OUTPUT
electronically over a network
using Windows Explorer



secure unit

FILEstream

specification



scanning paper documents

(features dependent on scanner)

- ▶ use FILEstream interface
- ▶ use native interface
- ▶ multipage/single page/numbered pages
- ▶ duplex/simplex
- ▶ paper source
- ▶ paper size
- ▶ brightness and contrast
- ▶ resolution
- ▶ colour, line art and greyscale
- ▶ save as BMP, JPEG, PCX, DCX, TIFF (various), PDF, HTML
- ▶ auto OCR
- ▶ scan more
- ▶ auto rotate

file import

FILEstream can capture computer files in two ways:

- ▶ using the file import option within FILEstream
- ▶ by choosing the FILEstream option when using the 'send to' feature in Windows Explorer

indexing options

- ▶ index to a custom template
- ▶ re-index if administrator permissions are granted
- ▶ index fields can be given a 'default value' – the value will appear automatically when using that template
- ▶ retain temporarily fixed values while indexing
- ▶ index values can be set as mandatory ('must fill' value)
- ▶ drop-down lists for frequently used index values
- ▶ incremental indexing eg. 001 002 003
- ▶ multiple indexing
- ▶ fixed zoom ratio button

search by

- ▶ index values, or any part of, across selected templates or all templates
- ▶ date range (system entry)
- ▶ any word within OCR'd documents
- ▶ file name or any part of file name

viewing options

- ▶ view documents as list files, thumbnails (variable size) or images
- ▶ over 200 file formats can be viewed as thumbnails or images: • PDF • raster • vector • autodesk/hybrid • autoCAD/colour • TIFF • PCX • GIF • JPEG • Sun raster • PNG • Photoshop • Office • Word • Acrobat/PDF • HTML • ASCII • PowerPoint • Excel etc etc
- ▶ multipage files are initially displayed as one thumbnail detailing the total number of pages. The document can also be viewed as individual pages if required
- ▶ selected pages, viewed as thumbnails of a multipage document, can be deleted, repositioned or appended to other pages creating new documents of varying size ready for indexing
- ▶ full screen image view with continued page/file selection
- ▶ in list view throughout the system, documents can be viewed in any sort order

image manipulation

- ▶ rotate clockwise/anticlockwise
- ▶ auto correct – selected thumbnails or images will automatically orientate, de-skew and despeckle
- ▶ fit to height/width/screen/full size and whole PC screen
- ▶ despeckle/deskew
- ▶ invert
- ▶ zoom

file/page view

- ▶ files or individual pages of files can be viewed using the backwards and forwards arrows or the 'GO TO' boxes on the tool bar
- ▶ with permissions, files or pages can be deleted

annotate options

- ▶ documents can be annotated with text, signature, stamps, freehand etc. The annotations can be visible, hidden or permanently 'burned in'. Annotated documents can be saved as revisions and are highlighted by the system

append options

A document may be attached to an existing document via the append feature. Insertion of the document can be to any section of the target document, at the start/end/or at a selected page. This function can be carried out:

- ▶ at the scanning stage
- ▶ as a file import from the network to a document in the FILEstream system
- ▶ via templates attaching to files already in the system

revised files

- ▶ indexed files altered in any way eg. by annotation, appending or distribution to other inboxes will result in a revision being created. The original document is preserved automatically unless selected otherwise in the administration section

delete

- ▶ documents or pages of documents can be deleted at various stages within FILEstream if authorised by the administrator when setting up user permissions

OCR

- ▶ imaged documents containing text, imported into the system can be OCR'd (saved to the database by the text content)
- ▶ imaged documents within FILEstream can be OCR'd and saved to any network pathway. The exported file can be edited.
- ▶ OCR formats include .TXT .PDF .DOC .RTF and .HTML

document information

- ▶ the following properties of any document may be viewed depending upon the file type

– standard tab

- | | | |
|------------|-----------------|---------------|
| • template | • filename | • file format |
| • folder | • volume | • no of pages |
| • size | • date captured | |

- **custom tab** displays the index values of a document

total current documents/pages

- ▶ shows the total number of documents and pages displayed on screen

send to

- ▶ allows documents to be sent within FILEstream from one user to another. Indexed documents will be sent as copies
- ▶ documents sent can be annotated and then returned establishing a useful system of document flow

change file name

- ▶ file names can be changed, the changes are reflected in Windows Explorer

save as

- ▶ documents from within FILEstream can be saved to any volume on the network
- ▶ the file format can be changed from or to BMP, JPEG, PCX, DCX, PDF, TIFF (various). The saved document is a copy of the document in the FILEstream system

print, fax and email

- ▶ documents within the system can be printed, faxed or emailed provided the necessary software is resident

administration

- ▶ **user setup** create/delete/edit users, passwords setup and routebox pathways; user permissions/revisions (append, delete, annotate, send to, index, re-index and image movement); assign templates to users
- ▶ **template set up** location pathway; create/delete/edit field names, types and values
- ▶ **group set up** create/delete/edit user groups; assign templates to groups
- ▶ **scanners** direct or network connection
- ▶ **password functions** change passwords; reinstate a lockout (where users have tried to log in incorrectly more than three times)
- ▶ **database** (Access only) the database can be moved to different locations
- ▶ **archive** documents can be archived to a specific volume such as a CD and this location called for when the document is searched for
- ▶ **backup** documents can be backed up to a specific volume and restored in the event of a data loss
- ▶ **system copy** (Access only) the database and documents can be backed up to a new volume such as a laptop computer. FILEstream can then operate from this new location
- ▶ **stamps and signatures** for annotations

scan drivers

- ▶ TWAIN and ISIS drivers supported
- ▶ any scanning device used to input images that can be viewed by the system

database

Microsoft Access or SQL Server V7 or 2000

minimum system requirements

- ▶ OS: Windows 98se, 2000, ME, NT and XP
- ▶ Processor: Pentium 2
- ▶ HDD: 500 MB
- ▶ Screen resolution: 1024 x 768 32 bit
- ▶ 128 MB RAM
- ▶ Internet Explorer version 5 or above

licensing

- ▶ this can be purchased in a variety of ways to suit different installations. Concurrent or fixed number licenses can be supplied

barcode (module)

- ▶ automatically indexes by barcode contents
- ▶ 11 barcodes supported plus variations
- ▶ checksum capability

FILEstream lite

- ▶ a lite version of FILEstream without OCR and some image manipulation is available for smaller applications and for clients. FILEstream lite is still fully able to import and index documents



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What's New in FILEstream 3.0

Additions and improvements since FILEstream 1.0

Scanning

- More comprehensive options for scanning single or grouping into multiple page documents
- Remembers settings for each scanner used
- Allows user to create scanner profiles
- Automatic OCR images after scanning
- Automatically rotate images after scanning
- Specify numeric patterns in scan filename {00000001}
- Simple Scan panel for easier scanning in TWAIN
- Advanced Scan panel for TWAIN and ISIS scanning with more options

File Import

- Import documents by drag and drop from Explorer
- Import documents from Outlook

Integration with other applications

- Automation Component for writing your own code to import, index and search in FILEstream

Add-In for Microsoft Office products – Word, Excel, Outlook, & PowerPoint.

- Documents/files/emails can be imported into FILEstream direct from the application or sent to other users.
- Documents can be indexed and searched for directly from these applications.
- Digitally signed messages can be imported from Outlook
- Outlook E-mail fields such as From, To, Date Sent and Date Received are imported into FILEstream

Automation component

- This allows 3rd party applications to access FILEstream (e.g. a bespoke Customer Information system).

Indexing and Cabinets

- More index field types such as Date, Time, Regional OCR, & Barcode
- More index field properties including mandatory fields, default values, & allow overwrites
- Cabinets available by group membership
- Ability to append document to last indexed document
- Ability to automatically OCR document when indexing
- Ability to keep indexed document in the inbox for multiple indexing to different cabinets/index values

Enhanced Searching

- Simple search panel for quick search
- Advanced search panel for more control
- Ability to save pre-designed advanced searches for later use
- List View of search can be exported as CSV file.
- Search OCR text in document and its attachments including All words, ANY words, Whole words and Exact Phrase

User Interface

- Enhanced Listview with more columns, user configurable, multiple sorting
- Split image and split single page view
- Documents of different file types can be grouped together as attachments
- Better / more toolbar icons
- Visual indication of archived, annotated, attached, missing and failed documents
- Customisable list view columns for each Cabinet and each user's own inbox
- User Editable lists
- Ability to move order of columns, turn columns on / off and remember column widths
- Ability to specify up to 3 sort orders on columns
- Progress indication of time consuming operations with Cancel button where applicable
- Allows user to choose between Adobe Acrobat viewer and native viewer for PDF documents
- Visual indication of document type using file type icon in list view and attachments list

Annotations

- Ability to create and annotate barcodes
- Ability to create stamps with images as well as text
- Create/edit/delete/copy annotation tools.
- Set of built-in annotations such as Highlighters, Notes, etc.

Revisions

- Automatic document revisions when changes are made
- Ability to view full document history (audit) of who did what, and when
- Audit history showing when documents are printed, faxed, e-mailed etc
- Deleted documents log showing list of all documents that have been deleted from the system

Regional Barcoding / OCR and Follow Fields

- Sections on any page can be assigned to OCR or barcode fields
- Follow fields functionality shows relevant section of document enlarged for each field when indexing
- Automatically reads barcode and OCR text and populates relevant Cabinet Fields

Customisations

- Ability to incorporate customer specific requirements which are only available to the customer
- Off the shelf customisation for automatically exporting data to CSV file when indexing
- Off the shelf customisation for looking up index values in any external database

Document Properties

- Documents can now track more information such as last action carried out, by whom, date modified, number of pages, revision and subject,

Document Notes

- Documents can have editable notes appended to them
- Public and private notes. Private notes only available to user who created them

Document Splitting

- Function to split multipage TIFs into single page docs or groups of documents
- Function to split Microsoft Word documents into single page documents

Image Enhancement Operations

- Deskew, Despeckle, Auto Correct, Invert, Remove Lines, Remove Borders, Add White Borders, Dilate, Erode, Rotate, Flip and Mirror

Attachments

- Documents can have files attached to them. Imported email automatically uses this feature.
- Attached files can be removed, opened, saved out, detached into your inbox, & OCR'd.

Document errors

- Document operations that fail are highlighted with an error

User messaging & "Sending"

- Internal messaging system for FILEstream users, including sending messages to multiple users and groups.
- Documents can now be sent to multiple users and groups.

Large Document Volumes

- 250,000 documents per Cabinet

Database

- Support for MSDE and SQL
- Support for multiple databases
- New databases can be created from within FILEstream on SQL and MSDE

Users, Groups and Permissions

- New user and group membership design
- More permission options
- Permissions by group membership
- User signatures assigned by administrator
- Users can view their own list of permissions

Logging On and Off

- Ability to log off FILEstream and log back on without closing the application
- Can run multiple FILEstream applications on the same PC – to work in different databases at the same time
- Admin option to allow same user to log-in multiple times on different PCs

Windows Identity (“Superuser”)

- Ability to run FILEstream under a special User Account instead of the logged-in User, which simplifies Windows security for documents.

Thumbnail caching

- Thumbnails cached on local system for quicker access
- Thumbnails automatically created/re-created when required

Licensing

- Flexible, user-maintained licensing with more comprehensive licensing options
- Ability to move licences between workstations without making a support call
- Individual Licensing for barcode, OCR and ISIS scanning
- Easier method for purchasing licence upgrades and installing upgraded licences

Printing

- Ability to specify margins and option for printing page numbers at bottom of TIFs

Archiving

- Ability to archive to and restore from removable media with spanning
- Ability to choose which documents to archive
- Ability to archive docs not modified since a given date

OCR

- Documents and Attachments can be OCR'd
- Also supports OCR for non image type documents (such as MS Word) enabling search for such documents by word content and highlighting such words
- Ability to view OCR text belonging to attachments

Document Import and Export

- Ability to export selected documents or entire cabinets
- Ability to import previously exported documents
- Makes it possible to transfer documents to other FILEstream systems
- Allows full and incremental exporting

Standard Cabinets

- Set of standard cabinets for different industries
- Ability to save cabinet definitions and create new cabinets from them, making it easier to exchange cabinets between systems

Word Search

- Ability to locate and highlight words and phrases in documents and attachments

Delete Log

- Automatically maintains a log of all documents deleted from the system
- Administrators can purge the delete log

Please note: FILEstream LITE version of the software is only suitable for standalone installations.