

FILEstream Features & Specification

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

- Word documents, Excel spreadsheets, PowerPoint presentations and Outlook E-mails can be imported into FILEstream directly from the application, sent to other users, or indexed directly to a cabinet.
- As well as sending and indexing, FILEstream documents can be searched for from within the above Office applications
- Choose file type for E-mails imported from Outlook
- Option to automatically delete E-mails from Outlook after importing them into FILEstream
- Option to send E-mail attachments as part of the e-mail or as separate documents in FILEstream.
- 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 and can be searched for.

Administration - Users, Groups, Cabinets and Permissions

- **User setup** Create/delete/edit users & passwords, setup Inbox & Route box paths (folder locations)
- **User permissions** set as Group Permissions (append, delete, annotate, send to, index, re-index, image movement, etc, etc). Users can view their list of permissions
- **User signatures** assigned by Administrator.
- **Group Setup** Create/delete/edit groups and apply permissions and user memberships in a group
- **Cabinet setup** Folder Location. Create / delete / edit - field names, types and values. Assign cabinets to Groups.
- **Copy Cabinets** Makes it easy to create a new cabinet which is identical to an existing one
- **Import / Export Cabinet definition files** allowing users to transfer cabinets between systems
- **Password functions** change passwords, reinstate a lockout (where users have tried to log on incorrectly more than three times).
- **Archive** documents can be archived to a specific volume such as a CD and this location called for when the document is restored.
- **Database Maintenance** Options to install MSDE engine, create new databases and change to another database
- **Allow multiple logins** Administrative option to allow the same user to work on different workstations at the same time
- **View and Purge Delete Log:** Administrators can see list of deleted documents and purge the list when required

Annotations

- documents can be annotated with text, highlighter, 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.
- create and store barcodes.
- create stamps with images as well as text.
- Create/edit/delete/copy annotation tools.

Append options (image documents only)

- 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 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 cabinets attaching to files already in the system.
 - One document can be repeatedly appended to many other documents

Archiving

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

Attachments

- documents can have files attached to them. Imported e-mail automatically uses this feature.
- attached files can be removed, opened, launched, saved out, detached into the inbox, & OCR'd

Barcode (module)

- automatically indexes by barcode contents.
- 11 barcode types supported plus variations.
- barcodes can be created & "burned" into documents.
- Created barcodes are stored in the database for re-use.
- See separate document on [More Details](#) page giving more information about FILEstream's comprehensive Barcode functionality.

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.

Database

- support for MSDE, SQL Server 2000, and SQL Server 2005.
- support for multiple databases.
- new databases can be created from within FILEstream on SQL and MSDE.

Delete

- documents or pages of documents can be deleted at various stages within FILEstream only if authorised by the Administrator when setting up User Permissions.
- document history can also be deleted if permission is granted. The original entry will only be deleted if the document is deleted.

Document errors

- document operations that fail are highlighted with an error flag and details of failure are shown.

Document Information

- information such as last action carried out, by whom, date modified, number of pages, and revision, subject, and notes.
- The following properties of any document may be viewed depending upon the file type -
 - o standard tab • cabinet • filename • file format • folder • volume • no of pages • size • date captured
 - o custom tab: displays the index values of a document
 - o attachments: attachments and notes to documents are displayed

Document Notes

- Public and Private notes can be added to a document with automatic entry of user name and date. Private notes only available to User who created them.
- edited/deleted notes shown in document history.
- notes e-mailed as attachment.

Document Flags

- Documents can be flagged as "Read" or "Un-Read", unread documents are shown in bold letters

- Documents can be flagged with different colour flags and a check box. The flags are also numbered to avoid problems with colour sight impairment.

Document Splitting

- function to split multipage MS Word documents and TIFs into single page documents or groups of documents.

Document Subject

- documents can have a subject column which is editable.
- subject can be automatically set when importing e-mail.

Export to C.S.V.

- document properties & index values can be exported to CSV file for import to other applications.

Document Import / Export

- Full and incremental export from selected cabinets or search results
- Options to allow disk spanning, include revision histories and delete exported documents
- Import documents into existing or new cabinets, with option to overwrite or copy existing files.

File import

FILEstream can capture computer files in several ways:

- using the file import option within FILEstream
- Import documents by drag and drop from Explorer
- using the MS Office Add-ins feature (see below)
- using a routebox and a Send To folder which are monitored for new files and automatically imported into FILEstream.

File / page view

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

FILEstream Lite

a Lite version of FILEstream without OCR, Barcode, ISIS, MS Office Add-Ins, and some image manipulation is available. FILEstream Lite is still fully able to scan, import, search for, and index documents.

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

Image manipulation & enhancement (image documents only)

- rotate clockwise/anti-clockwise.
- Deskew, Despeckle, Auto-Correct, Invert, Zoom, Remove Lines, Remove Borders, Add White Borders, Dilate, Erode, Rotate, Flip & Mirror.
- Auto-Correct: selected thumbnails or images will automatically orientate, de-skew, and despeckle.
- fit to Height/width/screen/full size and whole PC screen.

Indexing options

- index to a custom cabinet
- index field types such as Date, Time, List, Number, Currency, etc
- index field properties include mandatory, default values, & allow overwrite
- Cabinets available by group membership
- re-index if administrator permissions are granted
- retain temporarily fixed values while indexing
- drop-down lists for frequently used index values
- incremental indexing e.g. 001 002 003

- multiple indexing
- Barcode and OCR region auto-indexing
- Documents can be AutoOCR'd when indexing if this option is specified for the selected cabinet.
- The same document can be indexed to more than one cabinet if required

Integration with other applications (“Automation component”)

- Automation Component for writing your own code to import, index and search in FILEstream. This allows 3rd party applications to access FILEstream (e.g. a bespoke Customer Information system).

Large Document Volumes

- up to 250,000 documents per cabinet.
- Theoretically unlimited number of Cabinets (although the practical implications of the length of the dropdown list suggest that once the dropdown list becomes unwieldy, an additional database is the best solution).
- Up to 32,000 databases per SQL Server.

Licensing

- Flexible, user-maintained Licences which can be purchased in a variety of ways to suit different installations. Concurrent or fixed number licenses can be supplied.
- Ability to move licences between workstations without making a support call.
- Individual Licensing for barcode, OCR and ISIS scanning.
- Simple method for purchasing licence upgrades and installing upgraded licences.

Logging On and Off

- log off FILEstream and log back on without closing the application.
- run multiple FILEstream applications on the same PC – to work in different databases at the same time.

OCR

- Image documents containing text, imported into the system can be OCR'd (saved to the database by the text content). Documents can then be searched for by word content.
- Office documents such as Word and Excel files can be OCR'd and searched by word content.
- Document attachments can be OCR'd (optionally)
- image documents within FILEstream can be OCR'd to file and saved to any network pathway. The exported file can be edited. (NB the original file remains unedited.)
- OCR-to-File formats include TXT .PDF .DOC .RTF and .HTML.

Print, fax and e-mail

- documents or selected pages from documents within the system can be printed, faxed or e-mailed provided the necessary software is present.
- specify margins and option for printing page numbers at bottom of TIFs.

Programming Language

- Written in Microsoft VB.Net for maximum compatibility with modern operating systems.

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.

Revisions

- automatic document revisions when changes are made.
- full document history (audit) of images & actions performed on documents, and by whom, such as when documents have been printed, faxed ,e-mailed, annotated, etc.

- indexed files altered in any way e.g. by burnt-in annotation, appending or distribution to other inboxes will result in a fresh copy being created (the original file is still accessible in its indexed cabinet).
- Documents (e.g. Word.doc) launched in their application can be modified: Administrators have a choice of settings – to create a fresh copy each time the file is launched (preserving the original for audit purposes) or not to create such copies: in which case the original version of the file can be subject to unauditable change.

Save as

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

Scan drivers

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

Scanning paper documents

(some features dependant on scanner)

- use FILEstream interface
- use native Interface
- scanners: direct or network connection.
- remembers settings for each scanner used
- multi-page/single page/numbered page documents, with options for scanning single or grouping into multiple page documents: take from scanner all or specified number of pages.
- duplex/simplex
- paper source
- paper size
- brightness and contrast
- resolution
- colour, line art and greyscale
- filename
- save as BMP, JPEG, PCX, DCX, TIFF (various), PDF, HTML
- auto OCR.
- scan more (auto append).
- auto rotate & auto correct.
- dynamic threshold, border removal, etc
- 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.

Scan Profiles

- Scan profiles can be set up for different types of scanning jobs
- Profiles include scanner device, document options, auto OCR, rotate options and scanner settings.

Searching - Powerful & Versatile Capability

- simple search panel for quick search
- advanced search panel for more control, including “less than”, “more than”, etc
- save pre-designed advanced searches for frequent use
- List View or search results can be exported as CSV file, allowing import into other systems.

- search by

- index values (or any part of) across selected cabinets or all cabinets
- date range (system entry or last modified).

- search OCR text in document and its attachments, including ALL words, ANY words, Whole words, and Exact Phrase.
- file name or any part of file name.

Word Search

- quickly locate a word or phrase in any OCR'd document and all its attachments
- view the relevant document or attachment image and move through each occurrence of the selected word / phrase.

Send to

- allows documents to be sent within FILEstream from one user to another. Indexed documents will be sent as copies.

Thumbnail caching

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

Total current documents / pages

- shows the total number of documents in an Inbox/cabinet, and pages of selected documents.

User Interface & Viewing options

- easy to use, intuitive screens.
- view documents as list files, thumbnails (variable size) or images.
- Thumbnail views: multi-page files are initially displayed as one thumbnail detailing the total number of pages.
- User Editable lists: versatile Listview with user-configurable columns, multiple sorting, split image and split single page view. In list view throughout the system, documents can be viewed in any sort order.
- move order of columns, hide/reveal columns, retain column widths.
- specify up to 3 sort orders on columns.
- over 300 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.
- Option to view PDF documents using built-in viewer or Adobe Acrobat viewer.
- documents of different file types can be grouped together as attached documents.
- Split single page view: selected pages of Image documents, viewed as thumbnails of a multi-page 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.
- split image allows list or thumb view plus resizeable image view.
- visual indication of document status in all views.
- customisable list view columns for each cabinet and each user's own inbox.
- progress indication of time-consuming operations with Cancel button where applicable.

User messaging

- internal messaging system for FILEstream users, incorporating a history of messages sent and received.
- Messages can be sent with a link to a document search. The recipient can access these same documents upon receipt of the message by selecting the link.

Web Edition

- provides external access to FILEstream data over the Internet, or via an internal intranet
- upload new files and search for existing files from any PC with internet access, even without FILEstream installed on that PC.

- See separate document on [More Details](#) page giving more information about FILEstream's impressive Web Edition functionality.

Windows Identity (“Superuser”)

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

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