

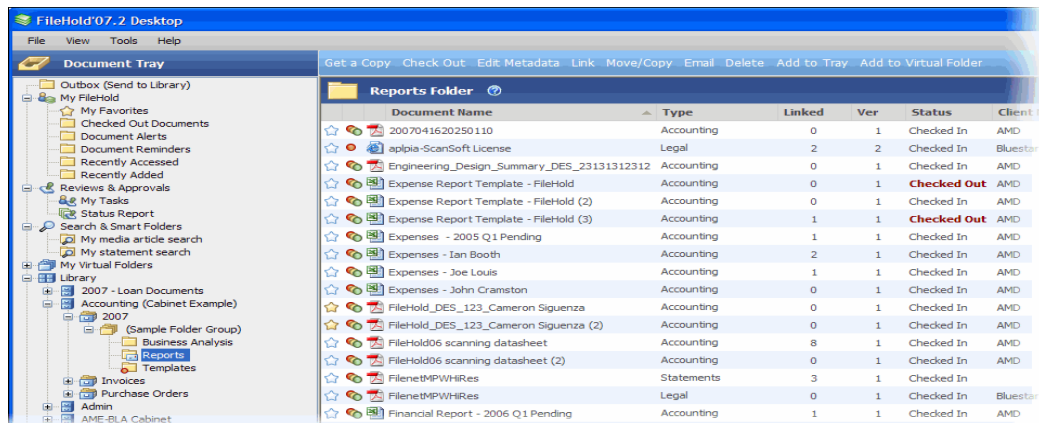


IQL DM Small Business Pack

Overview

The FileHold DM and RM Desktop

FileHold DM and RM Desktop offers a fully functional library tree view to all Libraries, Searches, Archives, Workflows, Inbox etc. The library tree provides user access to the different personal search, workflow and main views of the library. The below screenshot shows the expanded library tree including the Outbox (mass file tagging / upload utility) the My FileHold personal views (of the users checked out documents, alerts, reminders etc) the users personal workflow task list and status report, links to the library search utility, the users personal virtual folders and the library itself containing sample cabinets, drawers, categories and folders and documents.



Accessing FileHold from MS Office Applications

Users are able to access the FileHold library from the toolbar or file menu from within the following Microsoft Office 2003, XP and 2007 applications (Word, Excel, Outlook, PowerPoint and Visio). The below screenshot shows the dialogue box that appears when users browse to select a document from within FileHold. Notice the ability to view the entire library tree, the contents of a folder the the metadata for the selected file in a single view.

Get From FileHold

- Reviews & Approvals
- My Tasks
- My Virtual Folders
- Search & Smart Folders
- My media article search
- My statement search
- Library
 - 2007 - Loan Documents
 - Accounting (Cabinet Example)
 - 2007
 - (Sample Folder Group)
 - Business Analysis
 - Reports
 - Templates
 - Invoices
 - Purchase Orders
 - Admin
 - AME-BLA Cabinet
 - Engineering
 - Estimates & Quotes
 - Human Resources
 - Legal

Document Name	Type	Linked	Ver
2007041620250110	Accounting	0	1
aplpa-ScanSoft License	Legal	2	2
Engineering_Design_Summary_DES_23131312312	Accounting	0	1
Expense Report Template - FileHold	Accounting	0	1
Expense Report Template - FileHold (2)	Accounting	0	1
Expense Report Template - FileHold (3)	Accounting	0	1
HUD_89789789_bluesta	HUD	0	1
Intellectual property Statement	Legal	3	1
PO-236_1	Purchase Order	2	1
PO-2542545_1	Purchase Order	0	1
PO-42345234_1	Purchase Order	0	1
PO-987560098_1	Purchase Order	1	1
PO-98769876_1	Purchase Order	0	1
Purchase Request - Marketing	Accounting	0	1

PO-2542545_1

Metadata | Summary | Sign-Off

Type: PO No:

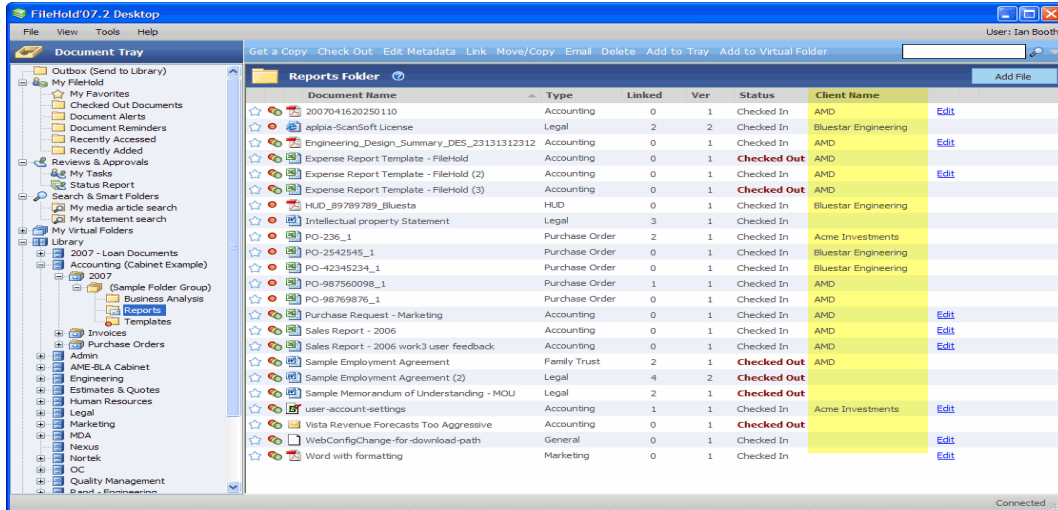
Client Name: PO Date:

Open File Options

Open these files after they have been downloaded

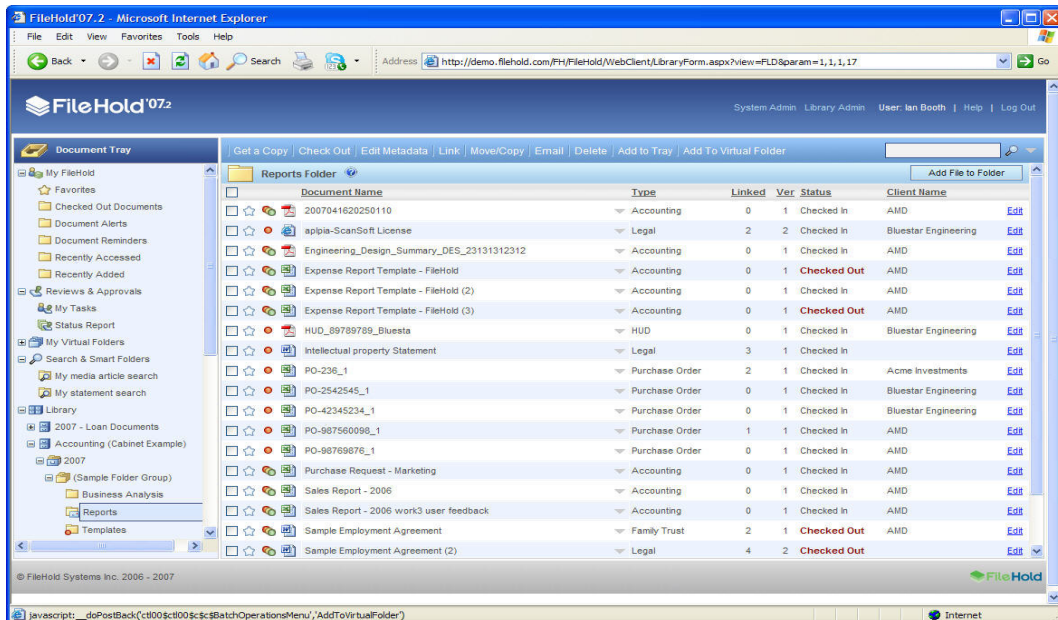
Document Folder Desktop View Detail

In this screenshot you can see a close up view of a folder in FileHold. For each document you can see information such as the version number (Ver), the number of files the document is linked to, the status of the document (if is checked out of the library or not). This users folder view has been further personalized to include values from a custom Metadata field (see highlighted client name).



Document Folder Web View Detail

In this screenshot you can see a close up view of a folder in FileHold. For each document you can see information such as the version number (Ver), the number of files the document is linked to, the status of the document (if is checked out of the library or not). This users folder view has been further personalized to include values from a custom Metadata field (see highlighted client name).



Document Tags (Metadata) View

This screenshot shows the metadata associated with the highlighted file stored in the Document Library. How a document is classified using metadata is customizable based on how the company has configured FileHold to track documents. Both levels of Metadata and document change history plus records management full audit level information is maintained.

The screenshot displays the FileHold 07.2 Desktop interface. The main window shows a list of documents in the 'Reports Folder'. The 'Expense Report Template - FileHold (3)' document is selected, and its metadata is displayed in the 'Metadata & File Properties' window on the right.

Document Name	Type	Linked	Ver
2007041620250110	Accounting	0	1
aplbia-ScanSoft License	Legal	2	2
Engineering_Design_Summary_DES_23131312312	Accounting	0	1
Expense Report Template - FileHold	Accounting	0	1
Expense Report Template - FileHold (2)	Accounting	0	1
Expense Report Template - FileHold (3)	Accounting	0	1
HUD_89789789_Bluesta	HUD	0	1
Intellectual property Statement	Legal	3	1
PO-236_1	Purchase Order	2	1
PO-2542545_1	Purchase Order	0	1
PO-42345234_1	Purchase Order	0	1
PO-987650098_1	Purchase Order	1	1
PO-98769876_1	Purchase Order	0	1
Purchase Request - Marketing	Accounting	0	1
Sales Report - 2006	Accounting	0	1
Sales Report - 2006 work3 user feedback	Accounting	0	1
Sample Employment Agreement	Family Trust	2	1
Sample Employment Agreement (2)	Legal	4	2
Sample Memorandum of Understanding - MOU	Legal	2	1
user-account-settings	Accounting	1	1
Vista Revenue Forecasts Too Aggressive	Accounting	0	1
WebConfigChange-for-download-path	General	0	1
Word with formatting	Marketing	0	1

Metadata & File Properties
Expense Report Template - FileHold (3)
Document Type: Accounting

Document Name: Expense Report Template - Fil...
Type of Accounting Document: Expense Report
Date: 05/16/2007
Vendor Name:
Client Name: AMD
Notes:
Previous File Next File Edit

Summary Properties
Owner: Ian Booth
Location: Accounting (Cabinet Example) / 2007 / (Sa...
Approval Status:
URL to File: Copy URL to Clipboard
Version: 1 of 1
FileHold ID: 586.1
Type of File: Xts
Format: Electronic Document
Scheduled for archival:
Scheduled for deletion:
Size: 23 KB
Checked Out By: Ian Booth on June 1, 2007 12:22:01 PM

Document Search Using Metadata

This screenshot shows a user searching for a document using metadata associated with a document. Metadata search and full text search features both come standard with FileHold. The metadata fields the user can search from are customizable based on how the company has configured FileHold to track different types of documents. You can see that a number of rows of search criteria have been added together to build the scope of the search. The search results are displayed below.

The screenshot displays the FileHold 07.2 Desktop interface with the 'Advanced Search' window open. The search criteria are defined as follows:

- Document Type: Purchase Order
- Purchase Order \ Client Name: In the List ABC Heating, Bluestar Engineering,
- Approval Status: Equals Approved

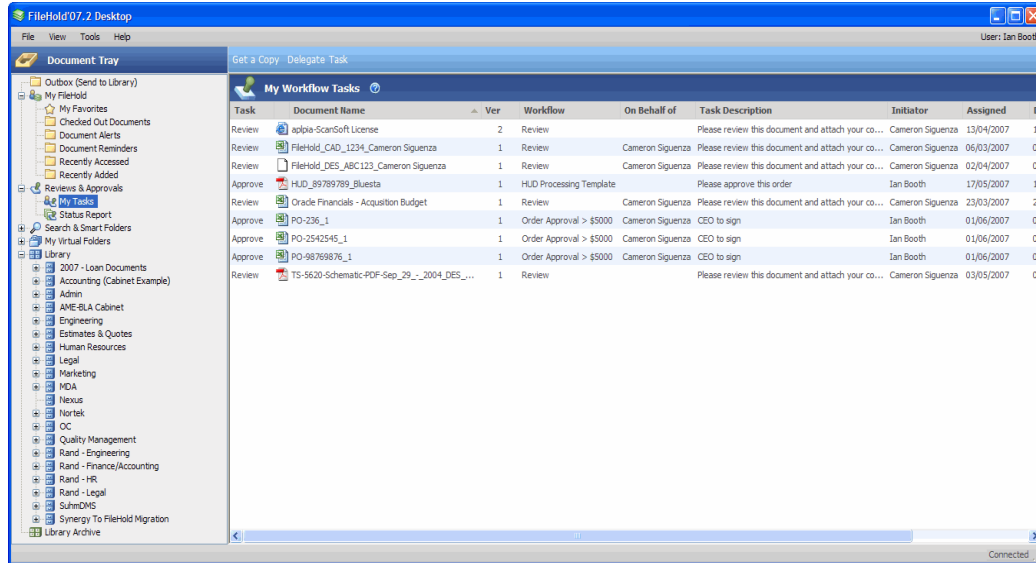
Search options: Search Metadata Only Include Archive in Search Include All Document Versions Search Using Historical Metadata Fields

Search Results 1-3 of 3

Document Name	Location	Type	Linked	Ver	Status	Last Modified	Relevance
PO-3123123_1	Accounting (Cabinet Example) / Purchase Order...	Purchase Order	0	1	Checked In	20/01/2007 10:59 PM	
PO-3453_1	Accounting (Cabinet Example) / 2007 / (Sample...	Purchase Order	2	1	Checked In	05/03/2007 2:54 PM	
PO-897987_1	Accounting (Cabinet Example) / 2007 / (Sample...	Purchase Order	0	1	Checked In	27/04/2007 9:52 AM	

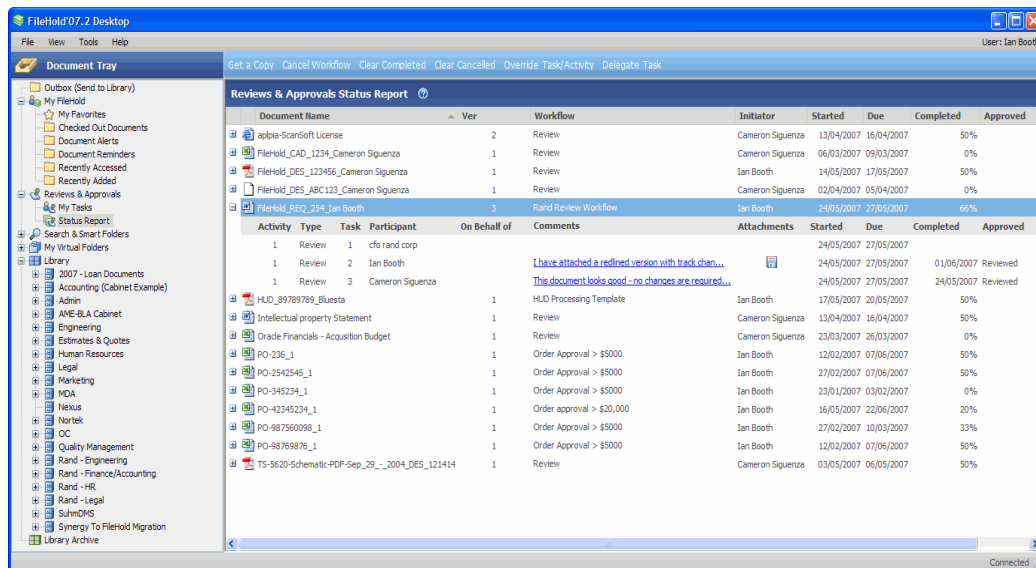
Document Workflow (Corporate or Personal) Task List

This screenshot shows a list of documents for review or approval workflow tasks that have been assigned to individuals or groups. For each task displayed details are shown including the document it relates to the task description, the initiator, if the task has been delegated to the user and more. The workflow is fully integrated with and are included in the solution.

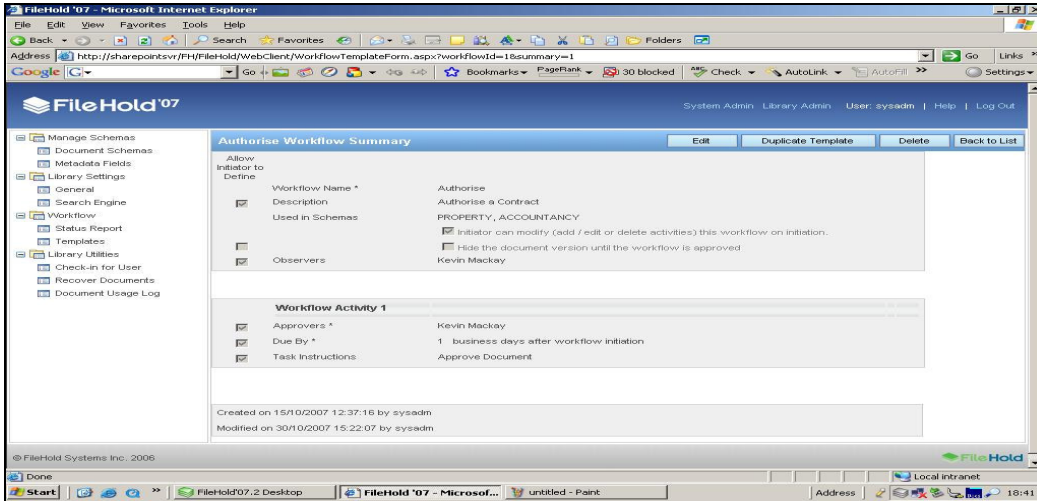


Workflow Status Reporting

This screenshot shows a corporate and/or personal workflow status report for all workflows that the user has either initiated, is a participant in or is an observer of. At a glance the user can see the status of each task and activity in each workflow, the items still to be addressed and comments or feedback documents provided by participants as they have completed their task of reviewing or approving a document.

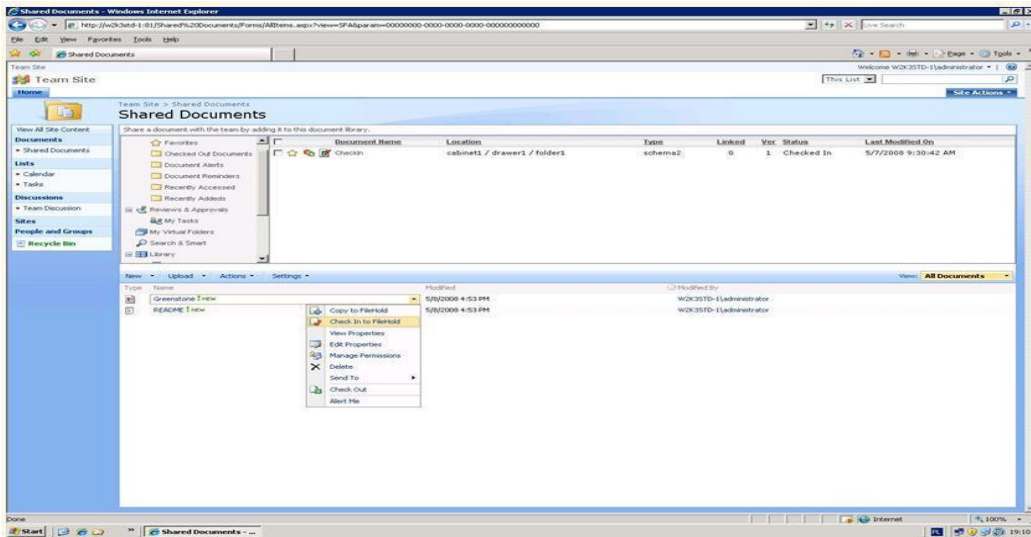
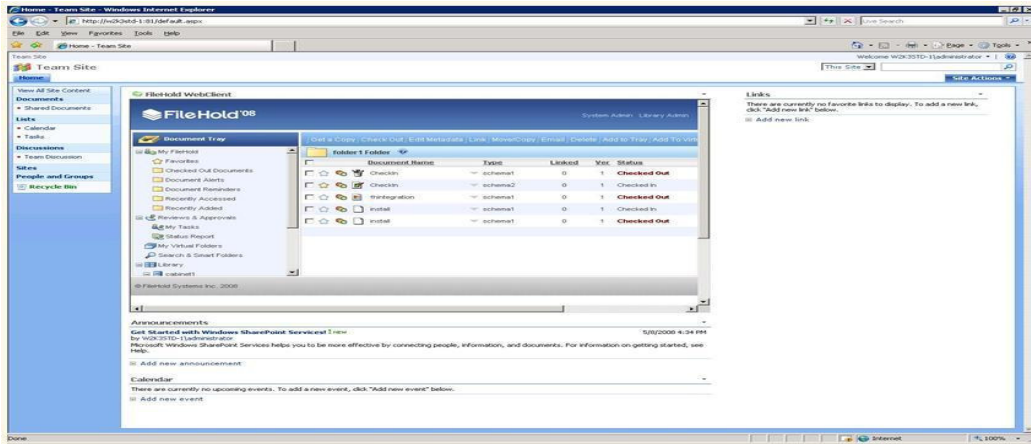


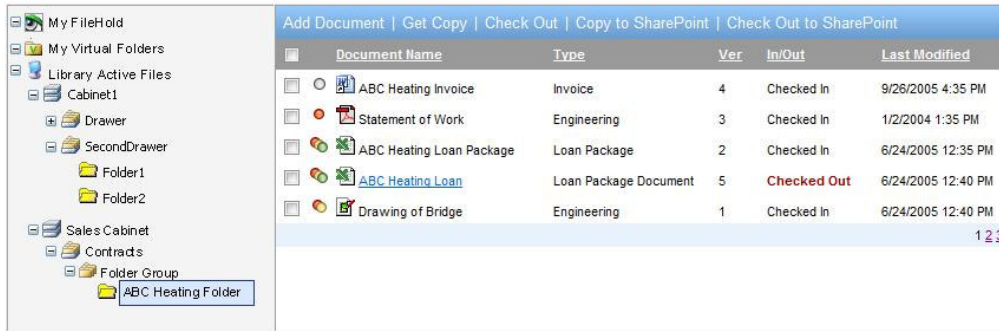
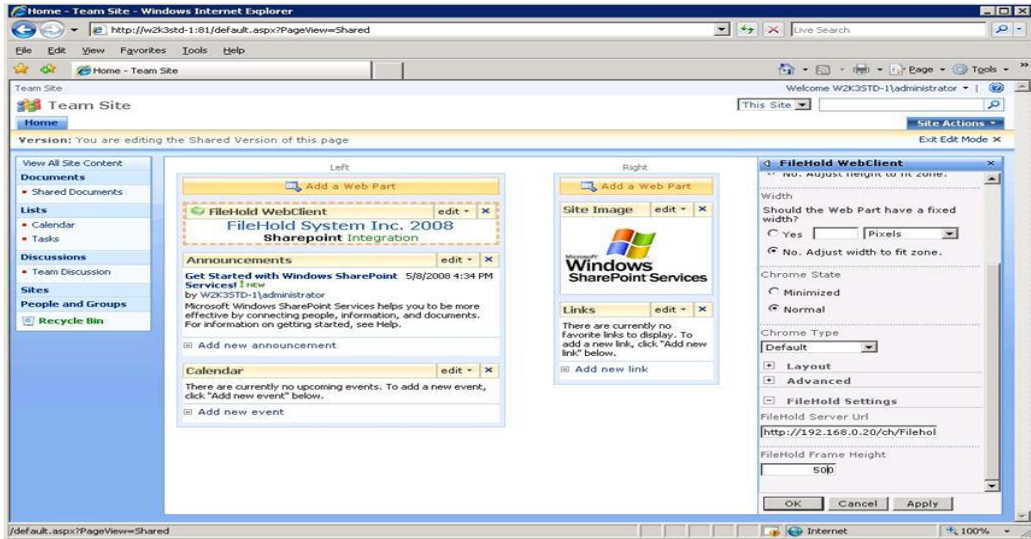
Workflows can also operate and interact with remote users as FileHold offers a fully featured Web Interfaces in all functional areas:



Multiple Sharepoint Integrations

FileHold V8.5 will offer many levels of Sharepoint integration, including standard portal integration, full object level integration, full federated search, document share and copy and full security integration. Some sample screenshots are shown below;





S-FC-110

Contextual menu actions of a SharePoint document (S-IN-110):

- [Copy to FileHold](#)
- [Check in to FileHold](#)

Matter Centric Management and Auto Tagging

Finally, FileHold V8.5 will also offer new Matter Centric Management or Folder Auto Tagging capabilities specifically designed for Legal, but usable by any type of business. Client and Matter folders will be dynamically created and allocated users and security via data from PMS or financial systems via a new bridge. These can then be set up with Metadata defaults that will enable users to save or drag and drop documents into these and no metadata will be required as it is already known by the solution. This speeds up and simplifies filing. This facility can be optionally switched on and off by folder.

