

## **FileHold 8.5 New Features.**

### **FileHold “FastFind” - 3<sup>rd</sup> Party Software Integration Feature**

FileHold 8.5 document management software introduces an optional feature to allow fast and easy integration with any “Windows Forms” 3<sup>rd</sup> party application. The FileHold “FastFind” feature allows users to establish “hot key” links from 3<sup>rd</sup> party applications to FileHold. This “hot key” allows users to find any document stored within the FileHold document library with a single key stroke. (This capability is often called Screen Scraping)

For example; a user, who has had the FileHold *FastFind* feature installed, is working in a windows based accounting application displaying a customer invoice. The user would like to see the original contract, or other documentation, that is associated with that customers invoice. To see the invoice the user simply puts their cursor on the Customer Name field (or just makes it the active field) and presses a designated “hot key” (i.e. F9). Upon pressing the hot key the customer name is transferred to the FileHold document search engine and all documents that have that customer name will be displayed in the FileHold document search for review. The user can select the appropriate document and has several options for further activity: review it using the FileHold viewer, open it in its native application for further work, or even initiate a workflow and send that document to a colleague for approval.

*FastFind* is an optional feature of FileHold 8.5 document management software. Purchase includes one software application hot key” being set up. After the initial set up users can further define additional “hot keys” on their own or have FileHold professional service do it for them. *FastFind* makes it fast and easy to integrate any Windows Forms based business application with FileHold.

To learn more about how FileHold can help make the vision of the Paperless Office a reality visit: <http://www.filehold.com/evaluate/datasheet.htm> and read the white paper on FileHold 3<sup>rd</sup> Party integration.

### **Microsoft SharePoint Integration**

FileHold 8.5 can be installed as a “web part” of Microsoft SharePoint. This gives users the best of all worlds: portals, wikis and collaboration that are the strength of SharePoint plus structured document management features that are the power of FileHold.

FileHold 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 supporting over 300 scanner types, CAD viewers, mark-up, redaction, document approval, document numbering, and 3<sup>rd</sup> party integration tools such as FileHold *FastFind* all in a single package.

FileHold 8.5 SharePoint integration synchronizes user rights and allows users to move document between FileHold and SharePoint with simple mouse clicks.

To see an independent consultant’s review of FileHold Document Management software and SharePoint integration go to: [Microsoft SharePoint and Integration with Content Management Platforms Whitepaper](#) .

### **“Auto Tagging” or Matter Centric Filing**

FileHold has always made it easy for users to add documents to the FileHold library for secure records management. Version 8.5 improves user document retention productivity to an even greater degree. FileHold document management software now allows users to automatically add searchable metadata or “tags” to documents that are associated with the same subject matter. This feature is often called “Matter Centric” filing in the legal industry.

A FileHold user simply drags a document into the an “auto tagging” folder and all the tagging is done automatically based on the tag settings of that folder. Once in the folder the document is fully OCR indexed to make the document easily found by either a metadata or full text search.

Permission to use auto tagging is based on the user and is configurable. Some users will want to manually create or confirm metadata fields for all documents and some will just set them one time and use the auto tagging feature. For more information on how auto tagging makes the Paperless Office easy read the FileHold White Paper on Auto Tagging in the resources section <http://www.filehold.com/evaluate/datasheet.htm> .

### **Document Control Numbering**

FileHold document management software has always assigned a unique sequential identification number to every document stored in the Library. In FileHold 8.5 there is the ability to create and print "Document Control Numbers" on complex documents typically found in engineering or R&D companies.

The Document Control Number can be created and applied by the user (FileHold checks to make sure it is a unique number and not in use elsewhere) or the user can start an auto numbering sequence and FileHold will automatically increment that number as each new document is added. Using the optional Brava viewers users can also choose to have this number printed on a selective number of areas of the document.

Document Control Numbering will be of assistance to companies who produce complex documents, by many people, over a long period of time and want to ensure that document numbering standards are being strictly enforced.

For more information on how Auto Document Numbering contributes to the Paperless Office read the FileHold White Paper on the FileHold resources page <http://www.filehold.com/evaluate/datasheet.htm> .

### **Enhanced / Manual Version control**

FileHold has always provided unique version control numbering – every time a document is changed the version number is incremented and a new version number is created. All previous version of a document are retained and the user can “roll back” to any previous version as may be required.

FileHold 8.5 document management software has an additional versioning scheme that allows users to trigger / identify major and minor document releases. This feature allows the recording of more complex version control numbers according to the users own versioning methodology. This feature will be of value to companies who have formal rules about major and minor version releases and will allow them to record this release standard in FileHold.

Using the optional Brava viewers users can also choose to have this number viewed or printed on a selective number of areas of the document.

For more information on Enhanced Version Control Numbering read the FileHold White Paper in the resources section at <http://www.filehold.com/evaluate/datasheet.htm> .

### **FileHold Reporting - SQL reporting Services tool set**

FileHold document management software comes with many built in reports that give administrators information about the usage of FileHold by document version and users. Every time a document is checked out of the library, or changed, that activity is tracked and recorded. These reports on document usage in the Paperless Office are standard features and contribute to regulatory compliance.

Every FileHold customer has unique needs and requests for special reports. To accommodate this need FileHold 8.5 comes with a tool set to enable users to develop custom reports using the Microsoft® SQL Server Business Intelligence (BI) Development Studio which installs with the SQL 2005 Database Server.

Since FileHold stores metadata (document “tags”) in SQL it is possible to use this tool to generate reports using a standard supported reporting platform. FileHold has adopted these reporting services and made them easy of customers to use.

For more information on the Paperless Office and FileHold Reporting Capabilities please review our white paper on FileHold Reports on our resources page at <http://www.filehold.com/evaluate/datasheet.htm> .

#### **General Productivity improvements**

In addition to many new features FileHold 8.5 document management software also comes with a number of improvements including:

- Support of Microsoft Vista and Office 2007
- Improved auto positioning by the Brava viewer to make metadata capture even easier
- Enhanced search capabilities including the ability to highlight the words being searched as they are found.
- Improved performance in the web client for remote operations
- Improvements in FDA folder display performance
- Implement Library Level Statistics reporting: Cabinets# -> Drawer# -> Folder# -> Document #. All totals per system, for both: Active and Archive Library.
- Implementation of repetitive markup burnings into CSF files.
- Add IT friendly (silent) FDA install / uninstall