

Do You Know....



FileDirector®
Document Management System

New Feature Highlights

Welcome to the latest Filedirector version 2.5

This document outlines many of the New Features of this Latest release as well as Highlighting some often forgotten previous Features.

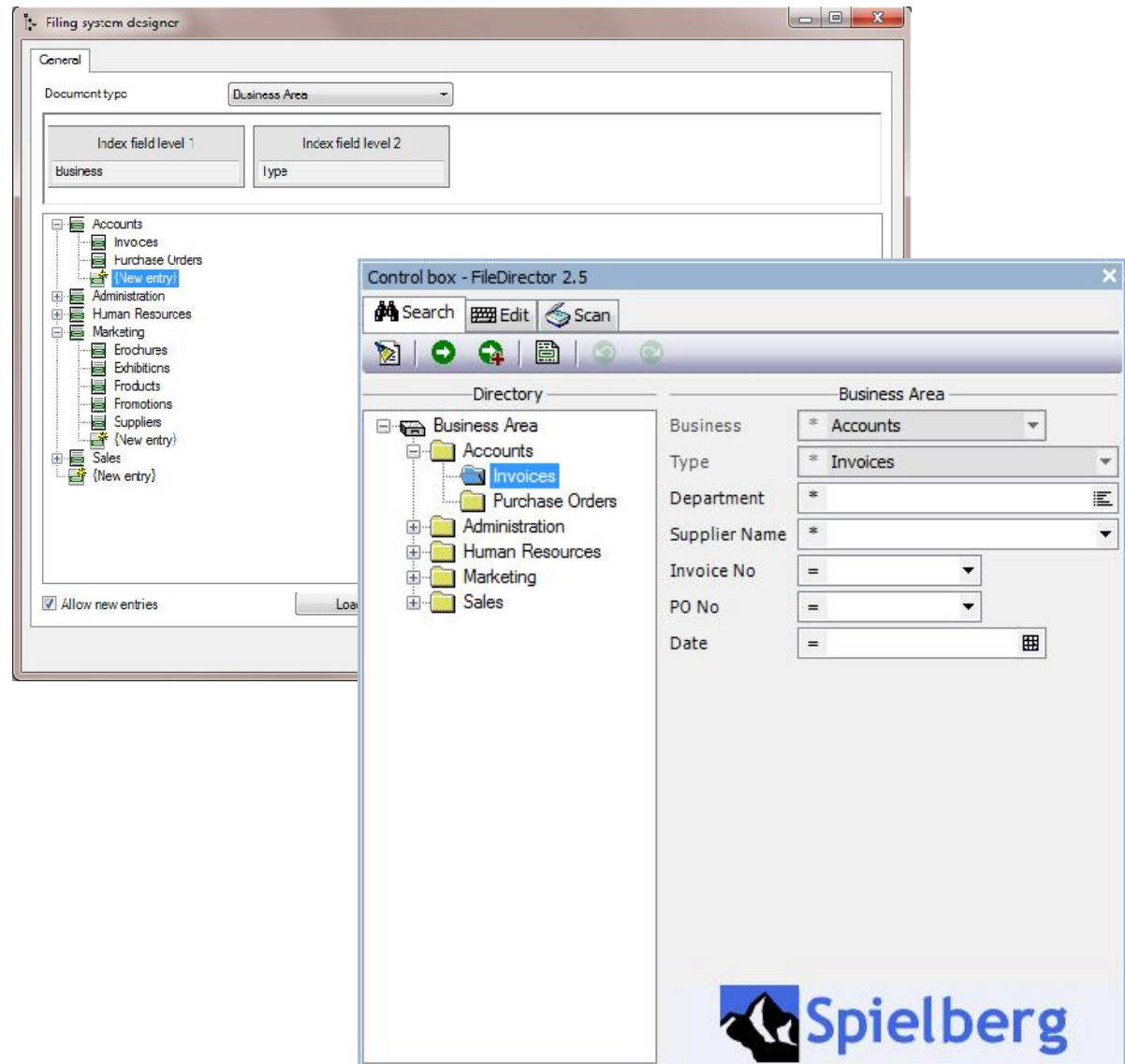
Please feel free to contact us to run through any of the enclosed features and make sure you are up to date with the latest release of the software.

Demonstration Licenses are available so please contact us.

This New Product is now ready for Demonstration on your systems.

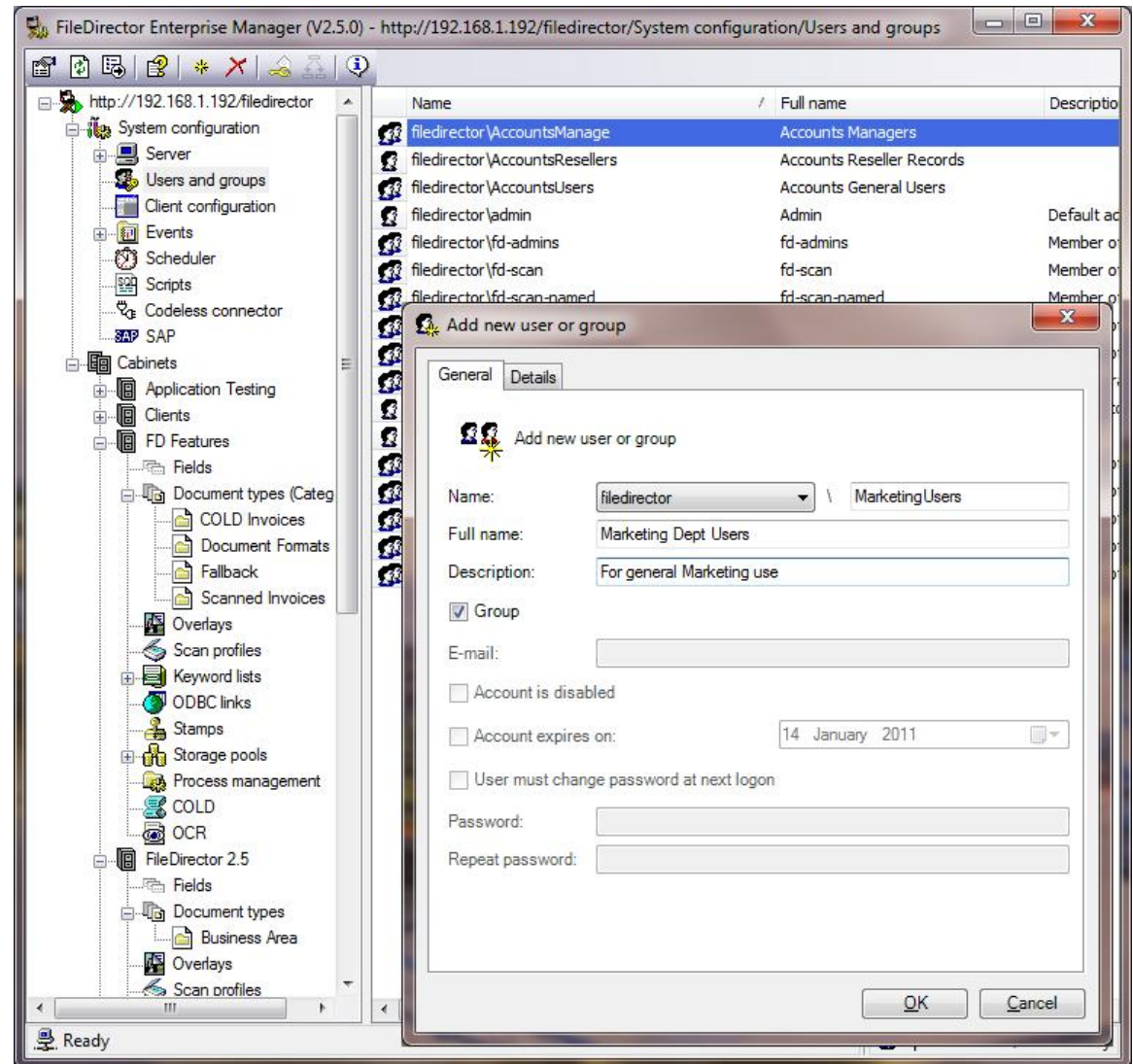
Make searching for and indexing documents easier by using the Filing system Designer.

Use existing keyword lists, or create them in the Designer



More Flexible access to FileDirector

Use FileDirector's internal user accounts feature instead of Windows accounts—or use both at the same time for different types of users



FileDirector Enterprise Manager (V2.5.0) - http://192.168.1.192/filedirector/System configuration/Users and groups

Name	Full name	Description
filedirector\AccountsManage	Accounts Managers	
filedirector\AccountsResellers	Accounts Reseller Records	
filedirector\AccountsUsers	Accounts General Users	
filedirector\admin	Admin	Default ac
filedirector\fd-admins	fd-admins	Member o
filedirector\fd-scan	fd-scan	Member o
filedirector\fd-scan-named	fd-scan-named	Member o

Add new user or group

General Details

Add new user or group

Name: filedirector \ MarketingUsers

Full name: Marketing Dept Users

Description: For general Marketing use

Group

E-mail:

Account is disabled

Account expires on: 14 January 2011

User must change password at next logon

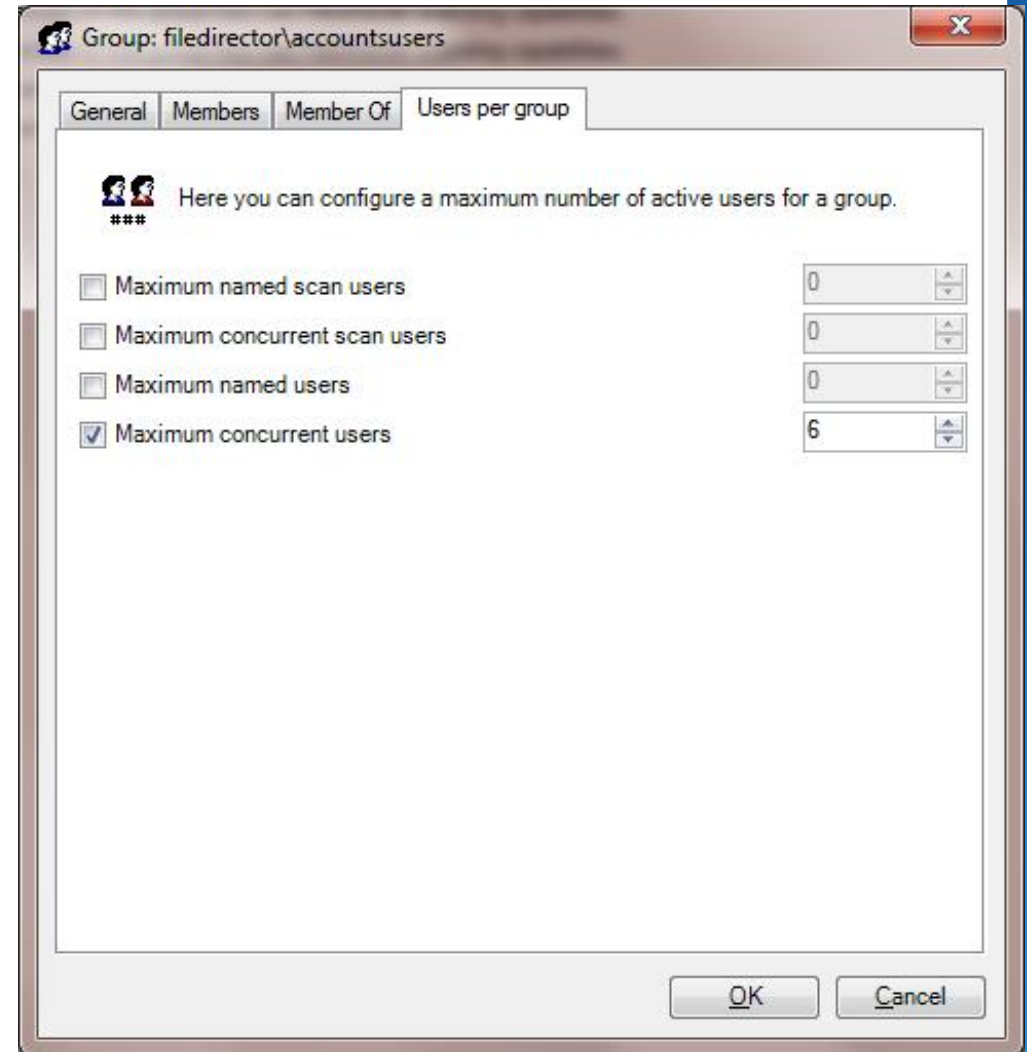
Password:

Repeat password:

OK Cancel

Make the most of FileDirector licences

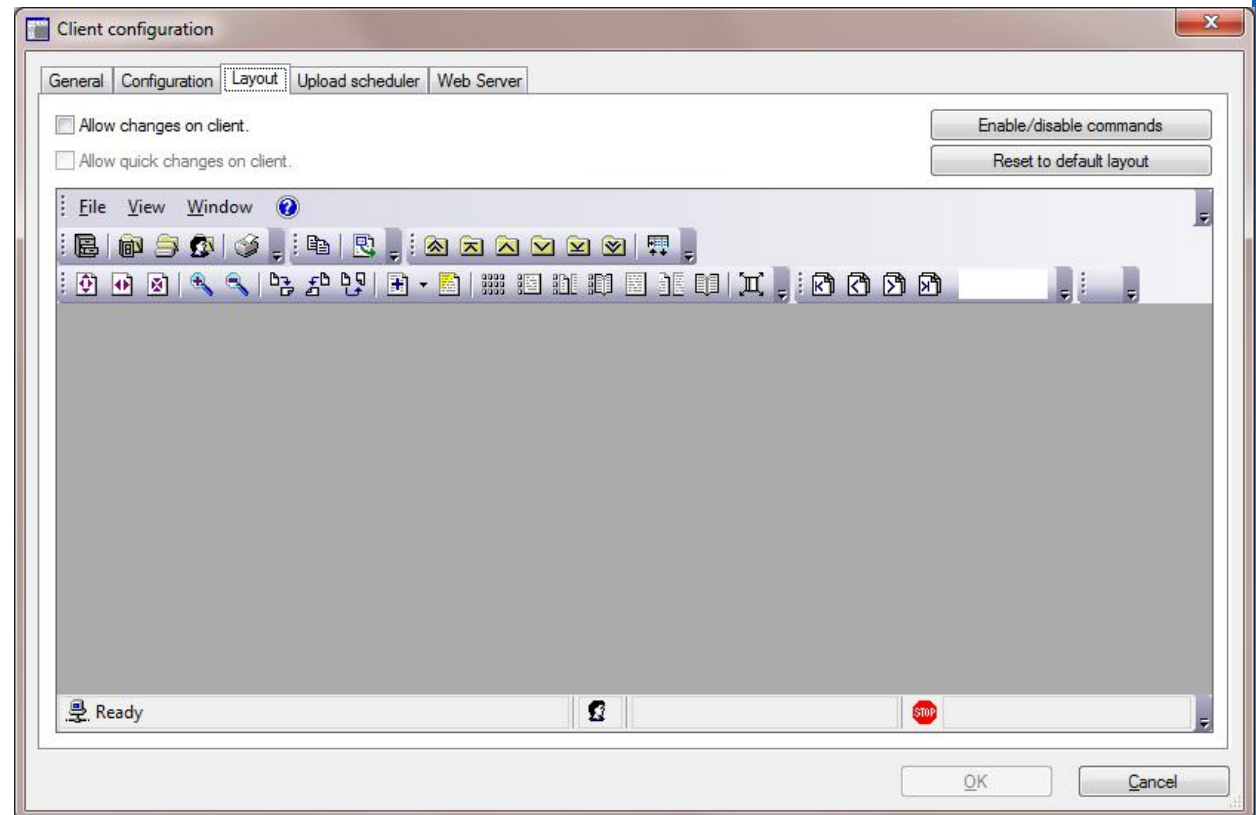
You can set the maximum number of FileDirector licences that a particular group of users have access to. This can ensure that licences are shared fairly between departments



Keeping the WinClient simple

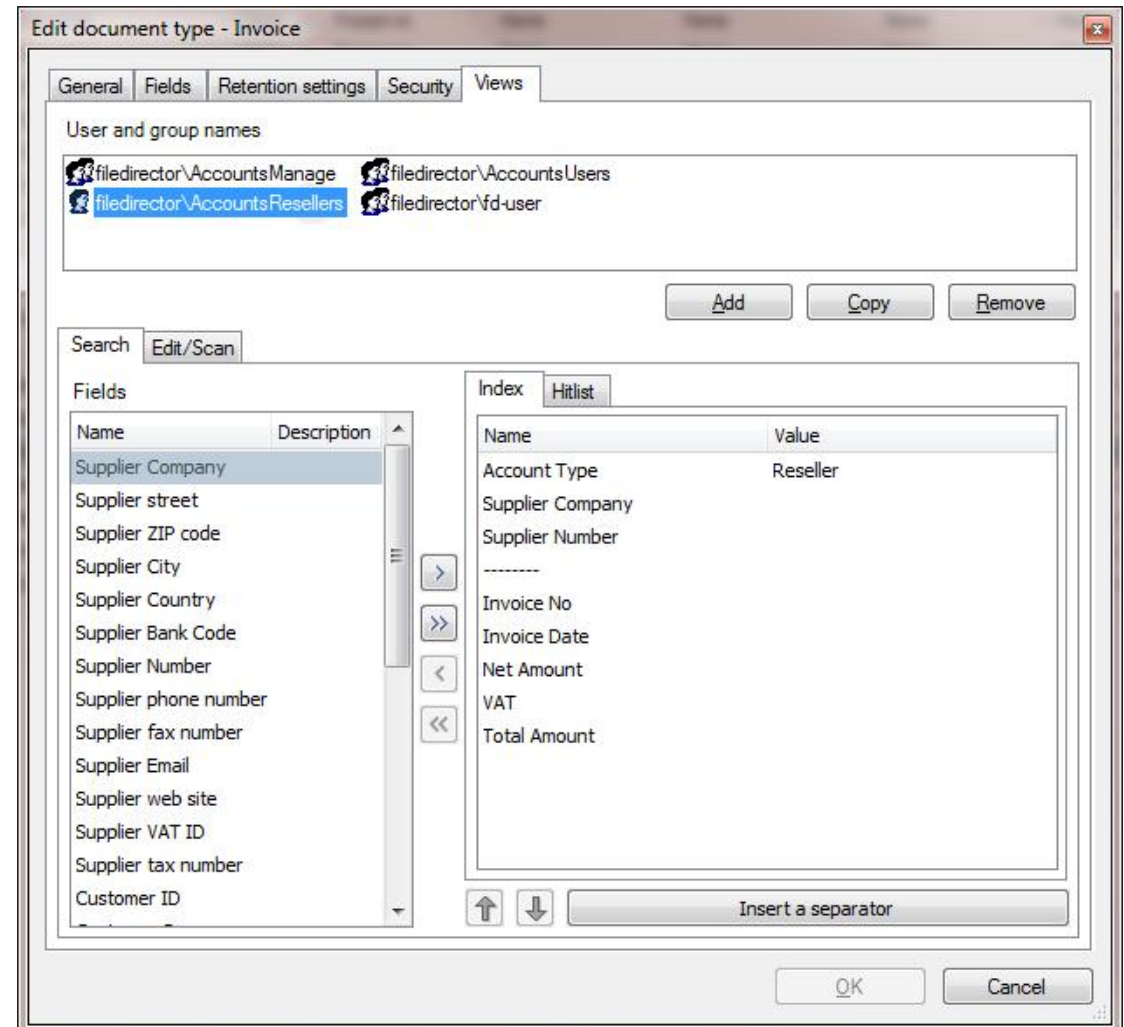
How the WinClient looks, and the options available to a user or group of users can be set from Enterprise Manager.

Get rid of any menus or toolbar options that are not relevant to what the users can do.



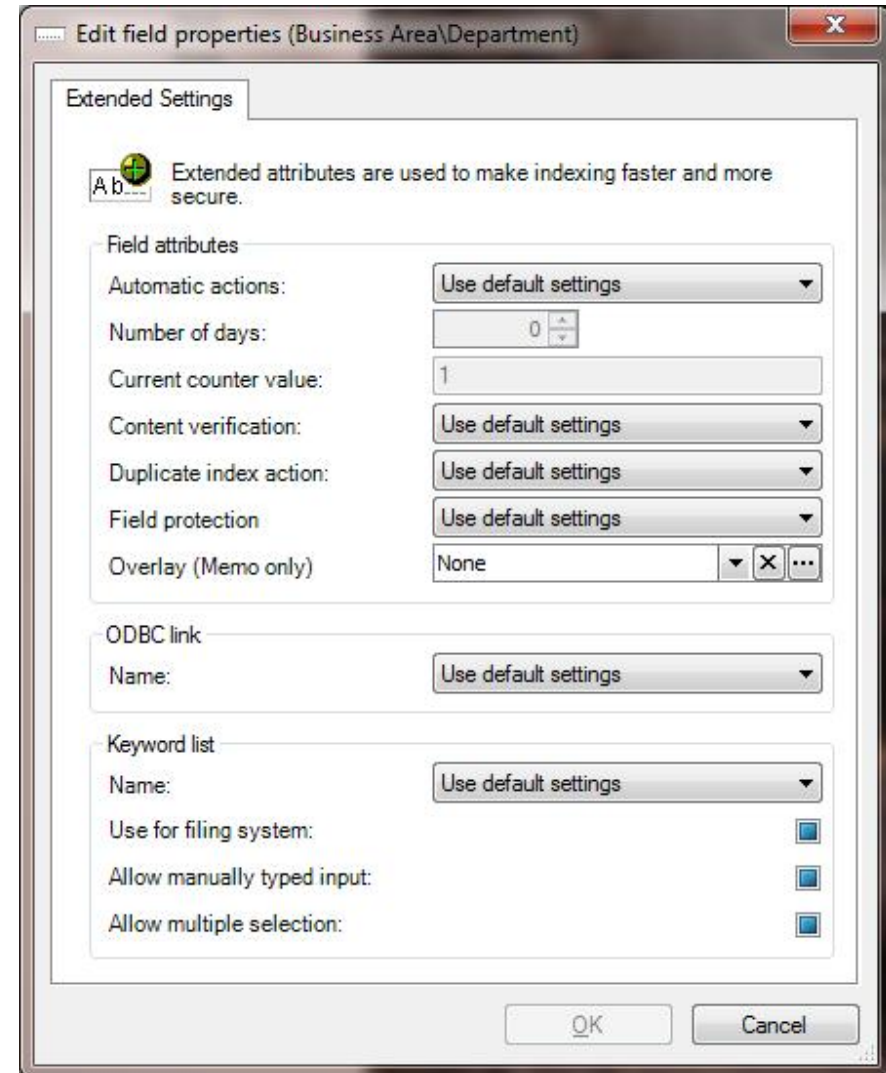
Only make available to users index fields that they need

*You can choose which fields are available to users or groups
Different fields can be chosen for searching and when editing or scanning. You can also choose which fields are displayed on the hitlist.*



Tailor field settings within each Document Type

An index fields extended settings can be changed from their default within each Document Type, even down to which keyword list is used, and ODBC settings.



Extended Settings

Extended attributes are used to make indexing faster and more secure.

Field attributes

Automatic actions: Use default settings

Number of days: 0

Current counter value: 1

Content verification: Use default settings

Duplicate index action: Use default settings

Field protection: Use default settings

Overlay (Memo only): None

ODBC link

Name: Use default settings

Keyword list

Name: Use default settings

Use for filing system:

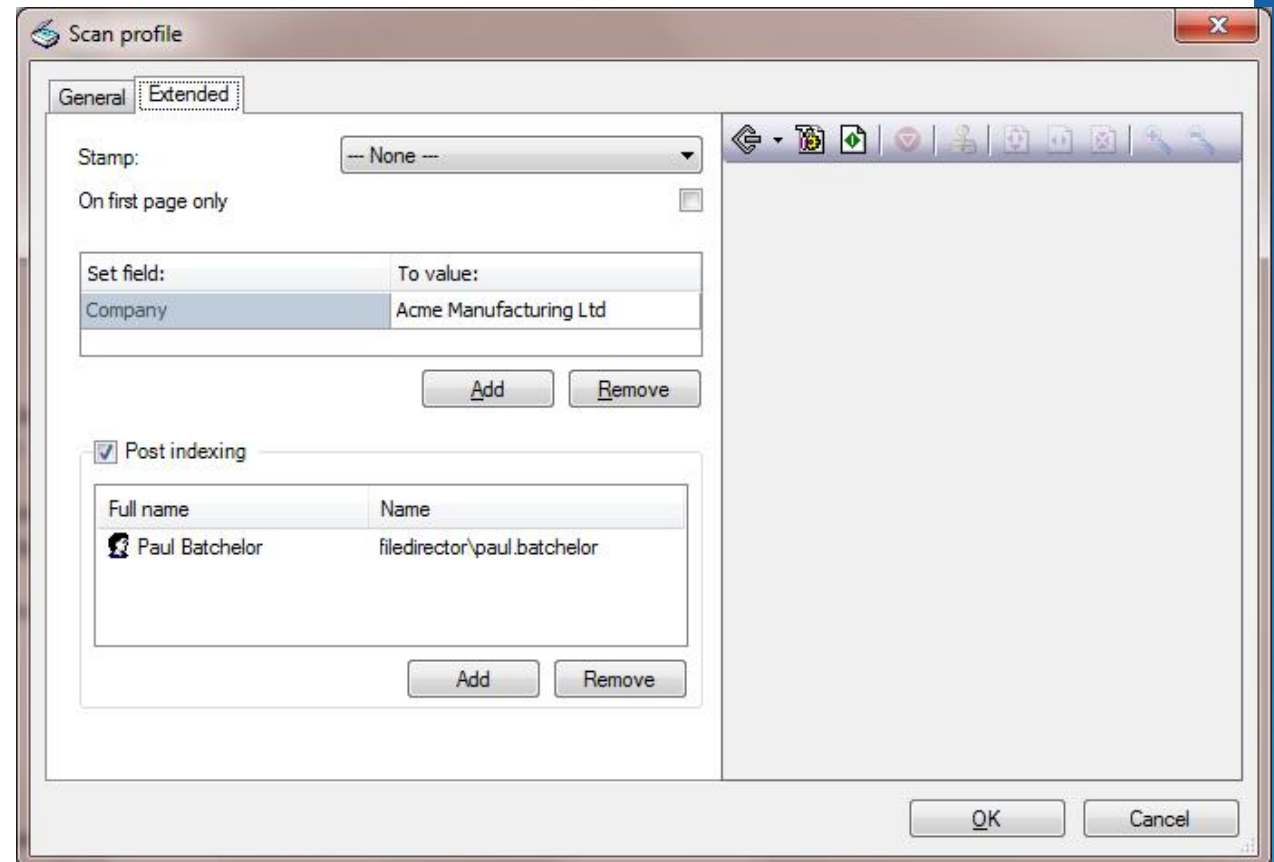
Allow manually typed input:

Allow multiple selection:

OK Cancel

Tailor a Scan Profile to the documents being scanned

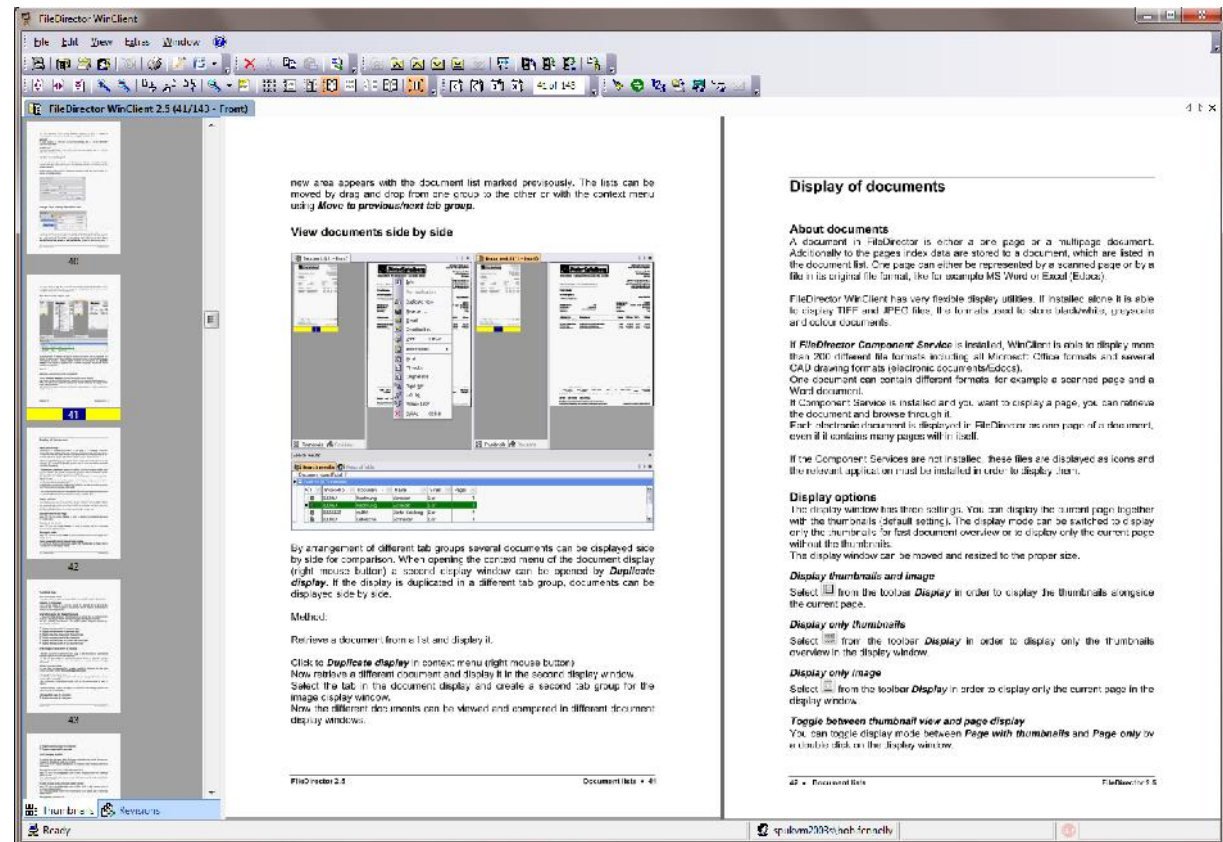
Using the Extended Settings, you can set field default values, apply a stamp to the documents, and also send the documents to the users for post scan indexing



Single or double page display is just a mouse click away

When viewing documents you can now choose whether to view 1 or 2 pages at once.

You can also choose when browsing through the document whether to advance 1 or 2 pages at a time when in double page display



Split OCR data over multiple fields

The contents of an OCR zone read from a form can be assigned to multiple fields within the Document Type. You can choose exactly how the data read is divided.

Index field mapping

Index	Target field	Verify
1	Company Reference	<input type="checkbox"/>
2	Invoice No	<input type="checkbox"/>

Assign by index number

Assign by text ID Field separator:

1. Character adjustment:

2. Left trim: Right trim:

3. From left: From right:

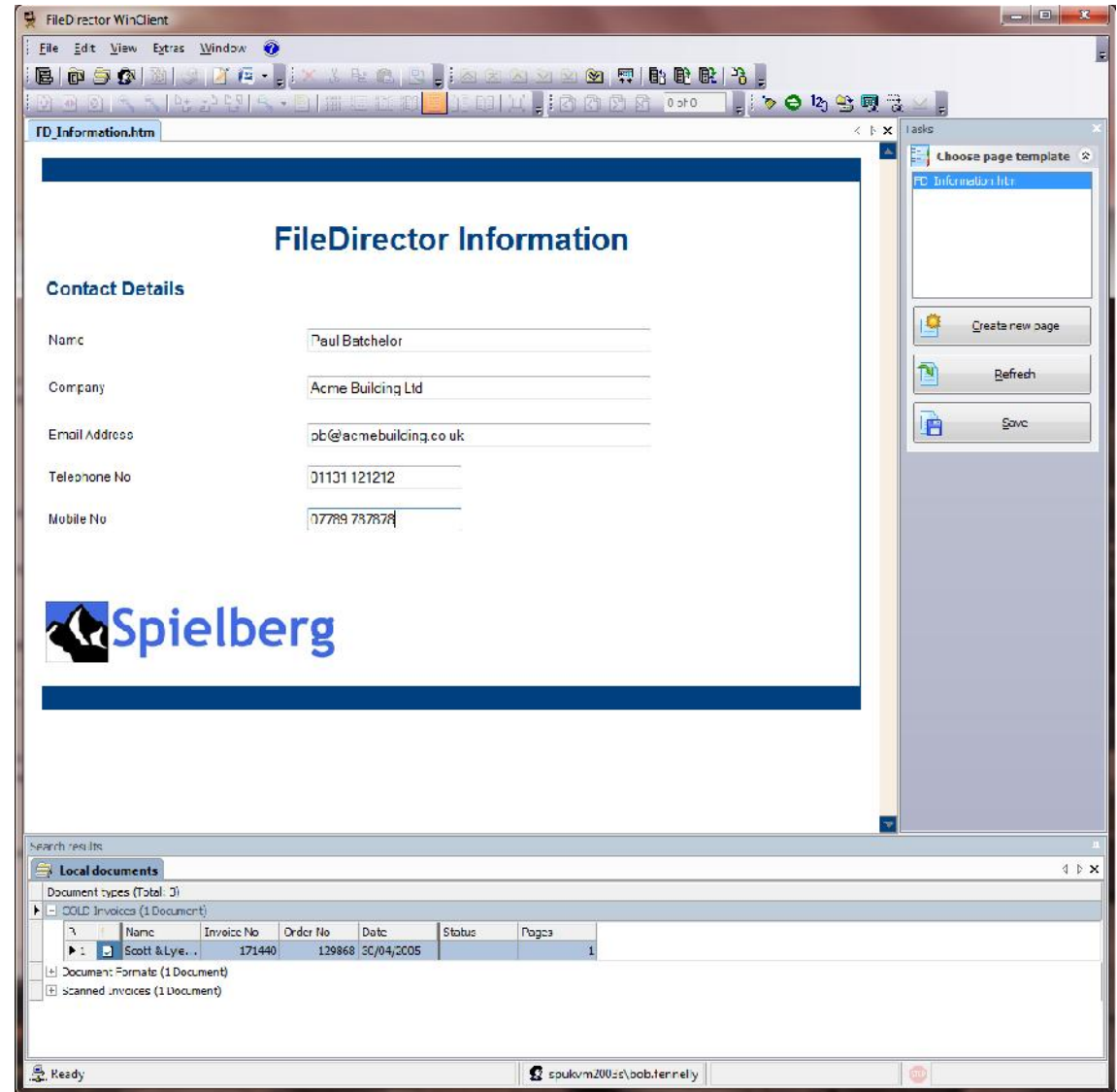
4. Prefix: Postfix:

5. Character adjustment:

6. Clear if not:

Enter information directly into a document

Templates can be created that link form data to FileDirector index fields. Type directly onto the form, save it, and a new document is created automatically indexed.



The screenshot shows the FileDirector WinClient interface. The main window displays a form titled "FileDirector Information" with the following fields:

- Name: Paul Batchelor
- Company: Acme Building Ltd
- Email Address: pb@acmebuilding.co.uk
- Telephone No: 01131 121212
- Mobile No: 07789 787878

Below the form is the Spielberg logo. To the right of the form is a "Tasks" panel with buttons for "Choose page template", "Information filter", "Create new page", "Refresh", and "Save". At the bottom of the window, a "Search results" panel shows a table of local documents:

Name	Invoice No	Order No	Date	Status	Pages
Scott & Lye. .	171440	129868	30/04/2005		1

The status bar at the bottom indicates the system is "Ready" and the user is logged in as "cpukvm2002s\pob.tennely".

Send documents to FileDirector using eCopy

You can enable eCopy with the FileDirector Connector to send documents directly into a Cabinet. Multiple connectors can be created, and you can even index them before sending.

