



FileVision Version 5 Features

FileVision is a new type of business productivity software -- Information Relationship Management -- that enables organizations to easily and strategically create relationships between important, disparate pieces of information.

Unlike existing business productivity solutions that fail to recognize or leverage informational relationships within an organization, FileVision bridges the gap between digital content and paper documents, helping organizations intelligently link and match documents to important data objects such as people, companies, processes and assets, resulting in improved communications, enhanced customer service and immediate access to information and relationships within the data. Customers will benefit from a cost reduction associated with access to and retrieval of information, information storage, filing errors, document version control, workflow process management, reporting and auditing.

Continue reading for a detailed list of features included in the FileVision information relationship management software.

Document Management

- Easy to use interface
- Ability to replicate paper based filing structure
- Access documents concurrently
- View multiple documents concurrently
- Storage of both scanned images and electronic documents
- Version control
- User definable color-coded document status indicators
- Document email
- Document printing
- Automated records retention
- Multiple annotation level capability with security
- Document relationship management
- Multiple indexing of single document
- Ability to separate or combine scanning and indexing

Search

- Multiple search and retrieval methods
- Search based on keywords
- Search based on filters
- Search across database
- Save search criteria
- Save search results
- Document retrieval based on relationships
- Document retrieval based on full text search
- Searchable detailed audit trail
- Remote document access
- Bulk email of document search results
- Bulk export of document search results

Security

- Hierarchical security structure down to document level security
- Multiple annotation level security
- Pre-defined access security at all levels of filing structure
- Department security
- Functional security to the button level
- File attachment management
- LDAP support

Technical

- Specialized page-by-page compression in CCIT or JPEG format
- Scanned images available in an industry Standard image format (TIF)
- Thin client technology
- Web-enabled HTML client
- User-friendly import and export capability
- Web Services API toolkit
- Fully-scalable architecture
- Configurable on single or multiple servers
- Object-oriented database included
- Load balancing
- Integration to Microsoft Office

Imaging and Capture

- Distributed Scanning
- Batch scanning process
- Image clean-up
- Color scanning supported
- Fax capture
- Email capture
- Pre-defined index values
- Roping to Index
- Roping to Clip Board
- Add keywords on the fly
- Forms processing
- Web scanning
- Electronic capture (edocs, multimedia, XML feeds)
- TWAIN compatible
- OCR
 - Batch Release to Kofax Ascent Capture
 - ICR
 - OMR
 - Bar coding
 - Built-in validation
 - Verify stage
 - Built-in VBA editor
 - Invoice processing
 - Web and Web forms capture
 - Address capture

Note: Some capture features available only with the purchase of additional software.

Workflow

- Workflow based on data or documents
- Supervisor control over subordinate inboxes
- Event sequencing
- View entire workflow and status
- Task prioritization
- Monitors timely execution of employee tasks - ensures accountability for assigned work
- Multiple levels of work accountability
- Event, data and document-driven automated actioning (predefined or on the fly)
- Support escalation of tasks
- Supports task notification via Email
- Single click access to workflow documents
- Attachment of additional documents to a workflow

Relationship Manager

- Point and click data field creation
- User definable, searchable and reportable data fields
- Definable data field security
- Manages any type of data and relationship
- Information sharing across departments
- Combined view of data, documents, actions and notes
- Definable view sorting
- Data history tracking
- Easy data import and export
- Integrated workflow
- Direct print communications using all data fields
- Searchable across entire knowledge base
- Ad-hoc action creation with notification
- Correspondence management
- MS Office® Integration
- Task tracking and management
- Integrated document management
- Relationship linking
- Fully searchable relationship notes
- Fully searchable relationship actions
- Fully searchable relationship action history

E-Forms

- Easy to use forms designer
- Input validation
- Date validation
- Entry of text
- Checkbox selection
- Radio button selection
- Selection from predefined look-up boxes
- Integration of data from keywords
- Integration of data from Relationship Manager
- Version control
- Document actions
- Workflow

- Security
- Import of graphics
- Link elements

Application Integrator

- Integration to any application on the Microsoft Windows desktop
- Hot button document search
- Hot button document indexing
- Hot button data search in the Relationship Manager
- Automated data input in the Relationship Manager
- Multiple types of tasks
 - Data mapping
 - Shell execute
 - FTP
 - Web URL
 - Mail
 - XSLT
 - Populate
 - Zip
 - Script
- Multiple event triggers
 - Event component
 - Project
 - File monitor
 - Task failure
 - Hot button
 - Timer

Custom Behaviors

- Event driven automation
- Scheduled, manual or polling trigger automation
- Graphical designer user interface for each configuration
- User interaction mode
- Design complex workflows
- Data replication and synchronization
- Automate custom imports and exports

ERM

- Auto imports and indexes PCL files
- Converts PCL files to FileVision documents
- Captures and stores reports from other line of business applications

Email Archive

- Auto archives and indexes email sent to Exchange Server
- Site behind Spam application
- Allows users to build an index repository of received email

About FileVision

FileVision is a global provider of business productivity software. Our solution, FileVision, empowers organizations to bridge the gap between digital content and paper documents by intelligently linking and matching documents and information to important data objects such as people, companies, processes and assets. Government, healthcare and financial services organizations worldwide rely on our technology to help them improve communications, enhance customer service and immediately access information and relationships within data. FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit www.filevision.com.



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