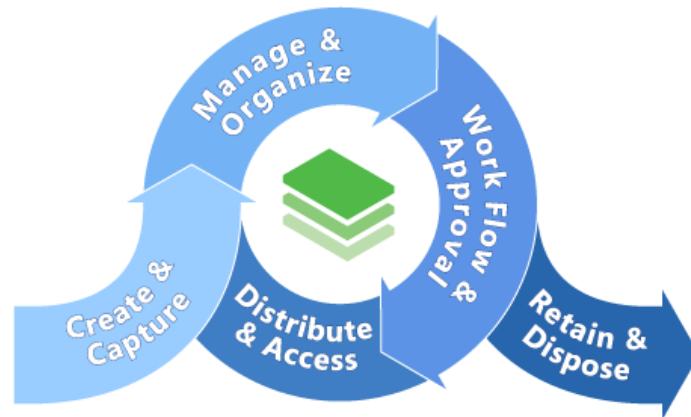


"On average, professionals spend 50% of their time looking for information."
Gartner Research

Paper-based and electronic information in the workplace is growing at an uncontrollable speed. The management of documents from creation to disposition is called the "document and record lifecycle." FileHold software manages this lifecycle from the time documents are created through review and revisions until they are no longer active and are automatically or manually archived and converted into electronic records. When these records are no longer needed, FileHold facilitates secure disposal.

FileHold Document and Records Management Software

The document lifecycle



"Every lost document costs anywhere from \$350 to \$700."
IDC

Create and Capture: The document and record lifecycle begins when paper-based or electronic information is created by users. Paper documents can be scanned into the repository using document scanners or Multi Function Centers (MFC).

Manage and Organize: Documents become usable when they are classified and structured in line with the business objectives and vernacular. Metadata tagging is applied to the document allowing advanced navigation and distribution.

Workflow and Approval: FileHold tools facilitate team collaboration. Version control, document linking, subscriptions, reminders, and electronic document workflow ensures that team members are able to work efficiently on the task at hand.

Distribute and Access: The powerful search engine indexes the text of every document that provides full text and metadata searching so that users can find documents in seconds. Documents can be retrieved via email, a web browser, FileHold FastFind, Microsoft Office® and Microsoft SharePoint®, information portals, or through third party applications.

Retain and Dispose: Throughout the document lifecycle FileHold ensures users are only working with version controlled information. Policies can be configured to automatically destroy according to corporate and regulatory compliance policies.

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Create and Capture

Drag and drop: Documents from network drives or desktop applications can be quickly added to FileHold using drag and drop.

Mass file additions: Mass importation of documents from other document management systems or structured data is made easy using the FileHold XML importation tool.

Streamlined document classification: Metadata is added from a centrally controlled document schema making documents easier to retrieve in the future.

Auto-tagging: Automatically add established metadata to documents that are added to an “automatically tagged” folder (known as Matter Centric filing).

Mobile FileHold: Mobile users can add on any device from anywhere in the world where there is internet access.

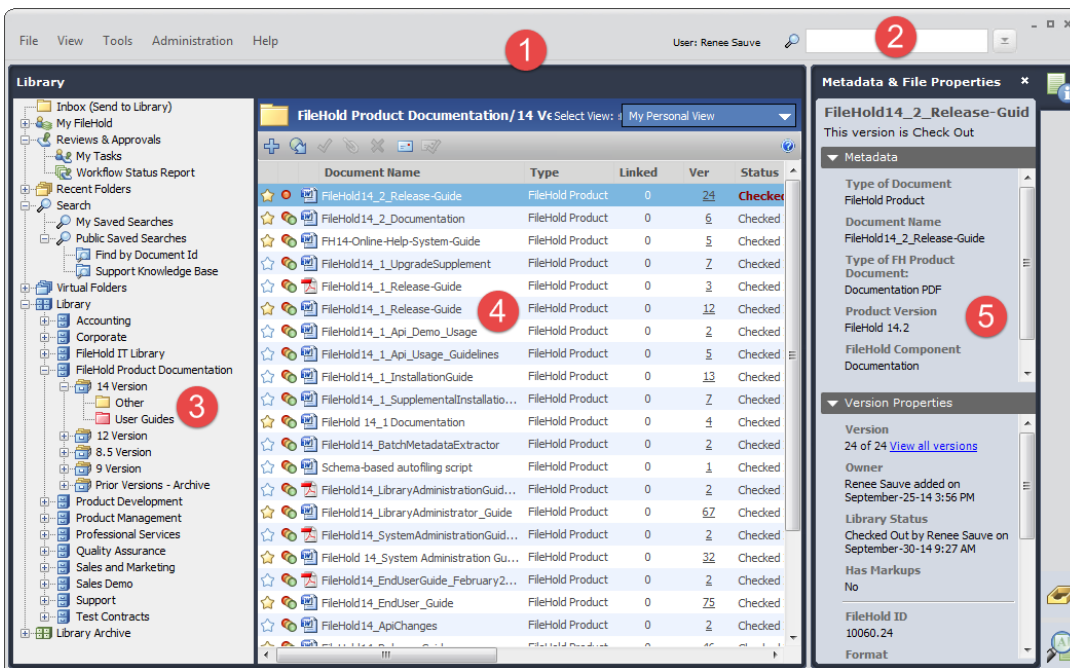
Document and record support: Manages all lifecycle stages for electronic documents and electronic records including rules and reports for archiving and disposition dates. Reports can be generated as required.

Hardcopy document tracking: Add metadata to track the location of hardcopy paper documents that are outside of the FileHold system such as in offices, in file storage rooms, or at remote offices.

Scanning paper documents: SmartSoft Capture document scanning software is provided with every sale to quickly add scanned documents to the library.

Assemble documents*: Combine documents from the library to create new documents on the fly.

*FileHold 15.3



1. Easy to use, intuitive interface ensures fast adoption by non-technical users.
2. Powerful searches allows users to find any document quickly.
3. Permission based library structure where users only see the documents that they have rights to see.
4. Powerful security, version control, and user audit reporting.
5. Metadata or “document tags” allows for the quick classification of document content.

Manage and Organize

Version Control: Provides check in/check out ability preventing documents from being overwritten or deleted as documents are updated. Previous versions of the file are maintained by the system in the event that rollback is required.

Linking and Shortcuts: Document-to-document linking or document to folder shortcuts allow users to bundle documents and files into logical groups and create bookmarks to documents that users frequently access.

Alerts and Reminders: Subscribe to be notified of edits to documents or changes to folders. Users are alerted of changes via email or their private notifications list. Set reminders for documents such as contracts that need attention in the future.

Saved Searches: Save your advanced search templates as a Saved Search. Every time the search is invoked any new documents that meet the query are brought into the results view.

Virtual folders: Allows users to aggregate links to documents located in various areas of the library no matter where they reside.

Workflow: For documents needing to pass through reviewers and approvers before they are ready for general distribution. Provides instant reports on the status of and documents in the review process.

Viewers: Document viewers allow viewing of documents without opening in their native applications.

Document Workflow and Approvals

Business automation: Automate business processes to streamline invoice payments, order processing, travel expenses, and time off requests.

Document collaboration: Documents are routed to collect feedback, comments, and updates prior to being signed off.

Document approval: Contracts and agreements can be routed for digital and/or electronic signatures.

Flexible templates: Workflow templates can be configured with set rules or processes or made informal where end users can define the template settings.

Courier: A secure, yet simple way to communicate contracts, announcements, and agreements to your employees, customers, or business partners for viewing and approving without the need for a FileHold user license.

Mobile FileHold: Review documents and approve contracts while on the go with our easy to use mobile software.

Workflow observers: Executives or auditors not participating in the review or approval process can monitor the workflow progress in the status report.

Automatic restart: Workflows can be automatically sent back to the workflow initiator or a previous activity in the template.

Workflow dashboard: Get a high level overview of the workflows including completed, in progress, or overdue.

Mass delegation: Have a high turnover of employees? Redefine tasks and initiators en masse so you don't have to cancel or restart any workflows.

Audit tracking: All history of workflow and Courier reviews and approvals are tracked in logs and remain attached to the documents throughout their lifecycle.

Convert to PDF: Convert a document into a PDF and append workflow information to the end of the document such as approver name, title, date, metadata, and more.

Distribute and Access

Web browser access: Users can easily access the document management software library using a standard web browser.

Mobile: The mobile workforce needs to access corporate information when working out of the office. Manage electronic documents on the go with FileHold Mobile technology.

Courier: Securely transmit documents to anyone with an email address for approval and e-signature

Microsoft Office integration: Tight integration gives direct access from the FileHold to Word, Excel, Outlook, PowerPoint, Visio and OneNote.

Powerful searches: A "Google" type search bar allows searching of metadata and document content or do a metadata search to retrieve exact results in seconds.

Microsoft SharePoint: FileHold can be installed as a web part of Microsoft SharePoint. Users can move documents between FileHold and SharePoint.

Email: Send documents as links or attachments directly to team members, partners, suppliers or customers. File security is maintained as only authorized users are able to retrieve the file using a link.

Integrate with other applications: The Web Services architecture and API allows for easy integration and distribution of documents with third party portal / ERP / CRM applications.

My FileHold: Acts as a launch pad to a users bookmarked documents, alerts, reminders, checked out documents, recently added or accessed documents.

Retain and Dispose

Document usage logging: Tracks how and when documents are accessed by system users. Provides a permanent record of who has touched the document in any way which is essential for regulatory compliance.

Disposal settings: Documents can be automatically deleted by the system based on disposition rules.

Convert documents to records: After a period of time electronic documents can automatically be converted to a record. Once this is done, no further changes can be made to the record.

Archiving: Documents can be moved from the Library to the Library Archive after a set period of time so they no longer clutter up the active document usage area.

Records management: Records may only be deleted from the library in accordance with their retention/disposition schedules or by a designated corporate records manager. Users may retrieve copies of records but not the original records themselves. Changed versions of records added to the library will be designated as new records.

Recycle bin: Documents can be easily recovered in the event that a user accidentally deletes a document by an administrator.

Stay in compliance: Reduce litigation costs by staying in compliance with federal or state guideline by having defined retention policies for archiving and deleting.

Event notifications: Need to know when a contract or policy needs renewing? Event notifications can be configured so important documents can be renewed on time.

About FileHold document management software

"I wanted to take a moment to thank you all for helping me. FileHold has one of the best troubleshooting teams I have encountered in all my experience. I also want to appreciate the promptness and willingness to go the extra mile. You all have exceeded my expectations and set the bar really high."

- Health Care Customer

"My users give me unsolicited comments on how well FileHold is working."

Manufacturing Customer

ABOUT FILEHOLD

FileHold document management and records management software is an off-the-shelf solution that ships pre-configured with user roles and an intuitive and friendly file structure that mimics the physical filing hierarchy of Cabinet / Drawer / Folder. The software installation is fast and easy compared to "platform" based products that can require consultation and IT resources often measured in weeks and months.

Our document management software allows companies to embrace the paperless office. Our standard software features and optional modules will meet your company's needs.

Software Upgrades: New document storage formats, new document scanners, new browsers, and new operating systems are constantly being introduced. The FileHold FileCare program ensures your software will stay current in this ever evolving technology world.

Technical Support: The FileCare program provides unlimited technical support and tracking with assured response times, severity classification and escalation processes.

Evaluation is Easy: Attend a regularly scheduled public webinar or ask for a personal demonstration of FileHold software. See for yourself how the paperless office can become a reality.

In House Trials: Ask for a no obligation trial of FileHold document management software in your own environment. We will guide you to solve your document storage business problem.

Trade in: If your existing file storage system is old and the upgrade costs are high or if there are exorbitant annual support fees consider upgrading to FileHold.

Pilot and Proof of Concept Projects: Start small with FileHold Express and realize the benefits to a single user group before expanding across the enterprise.

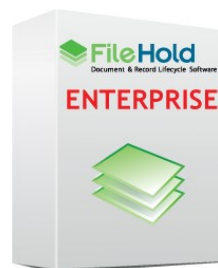
No Obligation Price Quote: Quick and easy just tell us how many users you have and a little bit about the business problem you want to solve.

FileHold Partners: FileHold has a worldwide network of consultants, software vendors and hardware partners that have been trained to implement FileHold software. These partners may provide back file scanning services, systems configuration support, records management expertise and needed hardware that add up to a total "paperless office" solution.

Architecture: FileHold is based on the Microsoft Service Oriented architecture which scales to support thousands of users and millions of documents.

Web Services API: Fully documented, no charge for you to create custom client applications or to integrate existing applications with FileHold.

FileHold products



FileHold Enterprise is the fast track to the "paperless office" for larger size organizations with more than 20 users and many millions of documents. FileHold software is available as a one-time license fee or pay per user per month installed on your own server or in the cloud. Every installation has both a rich desktop environment and a browser environment for access to documents from anywhere there is internet. Eliminate paper documents, shared drives and personal hard drives. Going paperless with FileHold document management software is easy

FileHold Express is for smaller organization that require a complete document management software solution or for larger organizations who wish to start small. FileHold Express has all the features as FileHold Enterprise, can accommodate up to 20 users, a million documents, and is easily upgraded to FileHold Enterprise. Included in the price of FileHold Express is six months of FileCare. With FileHold Express, going paperless with FileHold document management software is easy and affordable.

