



## FILESTAR Document Manager



*FILESTAR* is a multi-user document management system designed for the storage and retrieval of both paper and electronic documents. It has been designed to be installed with the minimum of technical support and used straight 'out-of-the-box' with no configuration.

*FILESTAR* implements a number of unique features such as 'Auto File' and 'Auto Title' to make filing of documents as simple as possible. Retrieval of documents is fast and intuitive allowing you to locate a document using the 'Windows Explorer' style treeview or searching on index fields and document content.

Use the integrated document scanning application to convert paper documents into digital documents, filed and titled with a few clicks of the mouse.

## Features Summary

### Document Filing



Import existing documents from your file system or scan paper documents directly using *FILESTAR* ScanStation. Use folders to organise the filing structure or use the 'auto-file' feature. Drag and drop documents and whole folders from Windows Explorer directly into a *FILESTAR* folder.

### Microsoft Office Integration



Using the MS Office users can add search retrieve and modify (subject to their permissions) documents held and managed by *FILESTAR* directly from within the MS applications. When working in Outlook, emails and attachments can be copied or moved into *FILESTAR* simply using drag drop

### File Watcher



For situations where documents are output to a folder on the server, whether it is from a line of business system or scanned pages from your MFD, Watched folder will automatically import the documents into the correct folder in *FILESTAR*. This can also include indexing information so your document arrives ready indexed.

## Features Summary (cont.)

### Editing Documents and Version Control



The check-out and check-in features of FILESTAR allow you to change document content in a controlled manner. When a document's content is changed, a new version of the document is stored in FILESTAR retaining the previous version - older versions can still be viewed if required or rolled back if changes need to be undone.

### Search and Retrieval



FILESTAR's search features are very powerful and very fast. You can search for a document using a combination of basic properties (Title, Date, and Description etc), document content and custom attributes. Searches can be saved and reused. Browse the results by document details or view document thumbnails. View the highlighted content search words in the 'hits' pane of the search window.

### Desktop Search Integration



Finding your documents whilst working in any MS Windows based application is as easy as highlighting your search criteria on screen with a mouse and clicking. The Desktop Search tool will find your documents and present them in a convenient window ready to use.

### Permissions



FILESTAR uses a simple but powerful permissions model to control what information users can see and what actions they are allowed to perform. The security model is independent of Windows and therefore easier to manage and implement.

### Audit Trail



Actions taken against documents are fully audited - the audit captures the name of the user, the date and time and even the workstation the user was logged into. The types of actions that are audited include document views, document updates, deletions - even the Category attribute values that are changed. Use the Comments feature to record notes against documents.

## Custom Attributes



FILESTAR uses a very powerful feature known as 'Categories' to allow users to create custom attributes that can be used to index documents. An example of a Category might be 'Timesheet' and some of its attributes could be 'Project', 'Employee', 'Period' etc. When you create a Category you have a range of options to determine how best to implement its attributes. For example, you can make the 'Projects' attribute visible to your users as a drop-down list or even a look-up field to a database within your organisation.

Once your Categories are defined you and everyone in your organisation can use them to file documents and to later search for them - for example you could find all 'Timesheets' for 'Project Acme' submitted after 'March 1st'.

Categories are also the mechanism by which you can enforce document filing and naming rules by using the 'auto-file' and 'auto-title' features. For example all 'Timesheets' will be filed automatically by first 'Project' and then 'Period', likewise 'Timesheets' will be automatically named using a combination of the Category name, 'Project', 'Employee' and 'Period'.

## Export Documents



Using FILESTAR does not mean your documents are locked in to its technology - you can easily export documents and their meta-data to the Windows file system.

## Scanning



Scan paper documents using the integrated scanning application (see below - ScanStation). Perform basic clean-up operations on the document such as de-speckle and de-skew. File directly into FILESTAR or to a document inbox (users with access to the inbox can subsequently file the document). Scanned documents can be automatically converted to Adobe PDF format and the document content can be converted to searchable text using the optional OCR module. The OCR module includes the 'Auto-Fill' feature that lets FILESTAR automatically recognise and populate category fields with data from the scanned document.

## FILESTAR ScanStation



ScanStation is **FILESTAR**'s integral document scanning application - specifically designed for turning paper into digital documents with the minimum of fuss - its user interface is simple and intuitive.

- Works with any scanner that has a compliant TWAIN driver, including fast multi-page document scanners
- Scan a whole document in one go using a scanner with a document-feeder
- Re-arrange pages, delete pages or insert additional pages from the scanner
- Perform document clean-up using the following features:
  - De-speckle
  - De-skew
  - Noise Removal
  - Crop
- Automatically read indexing information from the scanned page using the Auto-Template feature
- High performance page viewer - zoom in/out and pan around the page with ease
- Navigate the scanned document using page thumbnails
- Converts documents to Adobe PDF documents
- Save scanned documents directly into **FILESTAR** using 'Auto-File' and 'Auto-Title'
- Save scanned documents to a **FILESTAR** Inbox
- Populate Category fields automatically from data on the scanned document using the 'Auto-Fill' feature
- Convert paper into searchable documents using OCR
- Access and adjust your scanners full settings