

Enterprise Content Management:

The iFile Technology Solution for Improving Workflow Systems in Data-Centric Industries



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iFile Enterprise: The Technology Solution for Improving Workflow Systems in Data-Centric Industries

A well-developed and efficient workflow system routes the right information to the right people at the right time, utilizing labor in the most efficient way possible. iFile Enterprise provides custom imaging and workflow technology solutions for automating and improving the costly processes associated with your business documents—from advanced scanning and information storage hardware to the powerful workflow software tool: iFile by FileWorks.

This document introduces iFile Enterprise: document imaging and workflow systems that are flexible, scalable, reliable, and secure. It includes an overview of iFile software for imaging and workflow, an outline of iFile’s key features, and an introduction to applications within the software.

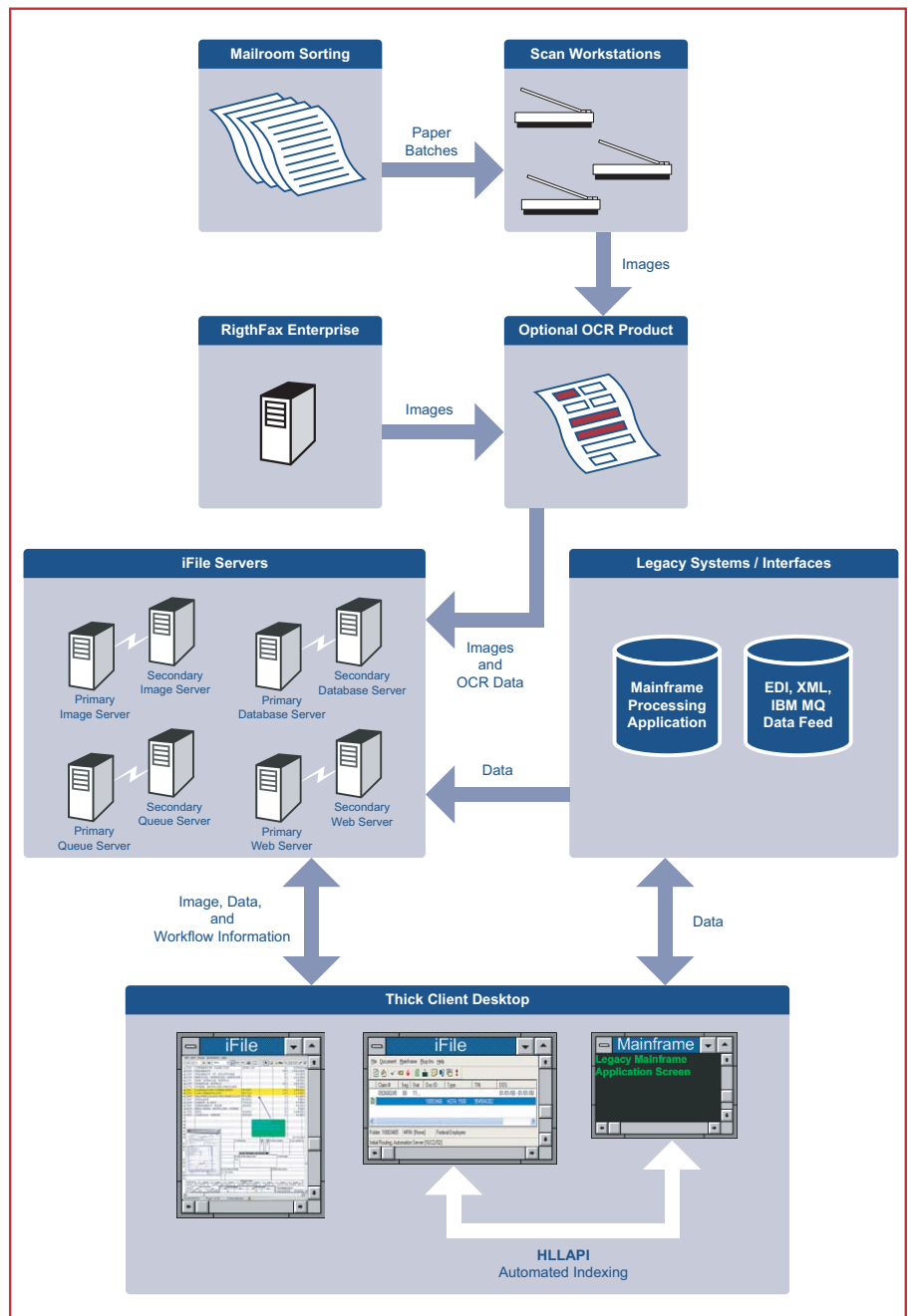
Whether you are working with mountains of paper documents or using another vendor’s technology, FileWorks will help you find a better way to manage your business information.

iFile Imaging and Workflow

iFile Enterprise utilizes high-speed scanners and fax servers to capture paper documents and convert them into electronic image files and data that can be stored or routed throughout your organization. iFile software captures critical information from scanned or faxed documents, EDI transactions, or XML, and stores your images in industry-standard TIFF format, enabling you to access the information through iFile’s user-friendly interface.

iFile’s intelligent imaging and flexible workflow capabilities enable you to define business rules and processes for your documents; capture and route documents to employees for review or approval; and use business information more effectively. Flexible, scalable, and robust workflow functionality makes automating almost any process more efficient. Parallel routing and document-centric design provide unique capabilities far more advanced than others on the market today.

iFile Enterprise combines sophisticated iFile software with powerful, reliable hardware and storage systems to optimize performance and ensure that your system is available any time you need it. Whether you work with invoices, medical claims, insurance applications, legal documents, hiring or personnel paperwork, or any other type of document, FileWorks’ solutions will improve your workflow process.



iFile Features

Serialized Notes

Add secured, read-only notes to work items. Notes include the user name, date, and time.

Document Annotations

Add highlights and annotations to documents.

Secure Annotations

Limit editing of annotations to users who are authorized by the system administrator to make changes.

Custom Document Viewers

Create your own custom viewers for other business data, such as quality audits and customer service forms.

Quality Assurance

Create custom audit forms and route them to the appropriate users.

Bundling

Group related documents to ensure that they are routed to and processed by the same user. iFile's bundling feature keeps key documents connected to one another.

Report Flexibility

Customize reports. Use database look-up lists for user and task selection.

Report Security

Prevent unauthorized users from running sensitive reports. Each report is secured by group membership, enabling administrators to control access to report information.

Technology Leadership

Leverage FileWorks' technology expertise. We constantly adapt to the cutting edge of technology. Our products leverage XML and Microsoft .NET technologies, and our consultants are experts in application development.

Proven Support Record

Take advantage of FileWorks' proven record of top quality, timely support. Our superior service is reflected in our 99.99% uptime and our commitment to customer satisfaction.

iFile Enterprise Functionality

Route Between Servers

Route documents between iFile Enterprise servers to connect your business units or remote offices, or to improve performance.

Work on Multiple Servers

Switch between iFile servers "on-the-fly."

Unix and NT Support for the Database and Image Server

Install the database and/or imaging server on various Unix platforms or NT 4.0 or higher.

Single Login

Authenticate users automatically by trusting Windows NT Domains or NetWare Servers.

Open Object Model

Leverage FileWorks' entire object model to write custom interfaces and components. You can access an image using Microsoft Excel by adding a few simple commands.

Non-Proprietary Format

Leverage an industry-standard file format to store your images. iFile uses TIFF Group 4 format for all images, ensuring that your documents are easily accessible.

Captaris RightFax Integration

Integrate with Captaris RightFax to capture and distribute documents by fax.

OCR Product Integration

Utilize FileWorks' open-ended system for smooth integration with products such as Cardiff TELEform and Captiva InputAccel or other standards-based technologies.

iFile Performance & Reliability

Availability Performance

iFile systems are available at all times—no down time is required for batch processing.

Reliability

FileWorks' solutions have a proven track record for reliable performance. iFile Enterprise provides 99.99% uptime, which equates to more productive time for your business.

Relational Database Support

iFile runs on Sybase Adaptive Server Enterprise or MS SQL Server. With high-end relational database support, iFile ensures optimum performance.

N-Tier Architecture

The iFile Queue Server caches routing delivery information, making delivery almost instantaneous, even with a large number of concurrent users.

Smart Image Caching

iFile anticipates the images you will need and retrieves them ahead of time to provide rapid image access.

Redundant Image Storage

iFile prevents the loss of data by allowing you to configure the server to write all images and annotations to a backup server that can be used in the event of a system failure.

iFile Advanced Routing

Supports VB and Java Scripting in Routing

Route documents based on your own business rules and components.

Real-Time Routing

Send documents instantly to other users with built-in real-time routing.

Parallel Routing

Simultaneously route documents to multiple destinations.

User-Configurable Routing

Customize the routing of documents by adding tasks, routing paths, and options. Changes take effect immediately.

Ownership

Define a sequence of best-case and next-best-case scenarios to identify the most appropriate recipient for a document.

Optional Class-Based Delivery/Prioritization

Prioritize documents based on your business needs. iFile delivers documents on a first-in first-out basis, but also allows you to assign weighted properties to the documents to increase their priority. The unique methodology used by iFile surpasses the standard priority system by more effectively balancing work for timely processing.

Vacation Scheduling

Enable supervisors to easily assign work to alternate users when employees take vacations or scheduling conflicts occur.

iFile Security Features

Managing Access

Your administrators manage access to images, reports, and annotations in iFile. Complete and unalterable audit trails provide the tools you need to ensure your information is secure.

Industry Compliance

Store, secure, and manage documents with iFile Enterprise to help your company comply with government or industry regulations, such as HIPPA, GPEA, Sarbanes-Oxley, etc.

iFile Client Applications and Components

iQuery

Rapidly locating the correct document will keep your workflow quick and efficient. Even more important is the capability of selected staff and supervisors to monitor productivity and manage workloads.

iQuery, the component of iFile that is used to find documents and run reports, is an effective tool for research and ad hoc reporting—keeping you on top of your department’s workload and allowing you quick assessment of productivity.

It is the ideal tool for viewing documents, notes, and history when fulfilling customer service needs. Quickly and easily retrieve documents using key fields you define, or rely on iFile’s repository of standard reports to provide the key information you need for efficient management of your projects and personnel.

- Perform quick searches for documents with the customizable Quick-Find window.

- View, annotate, and route documents.

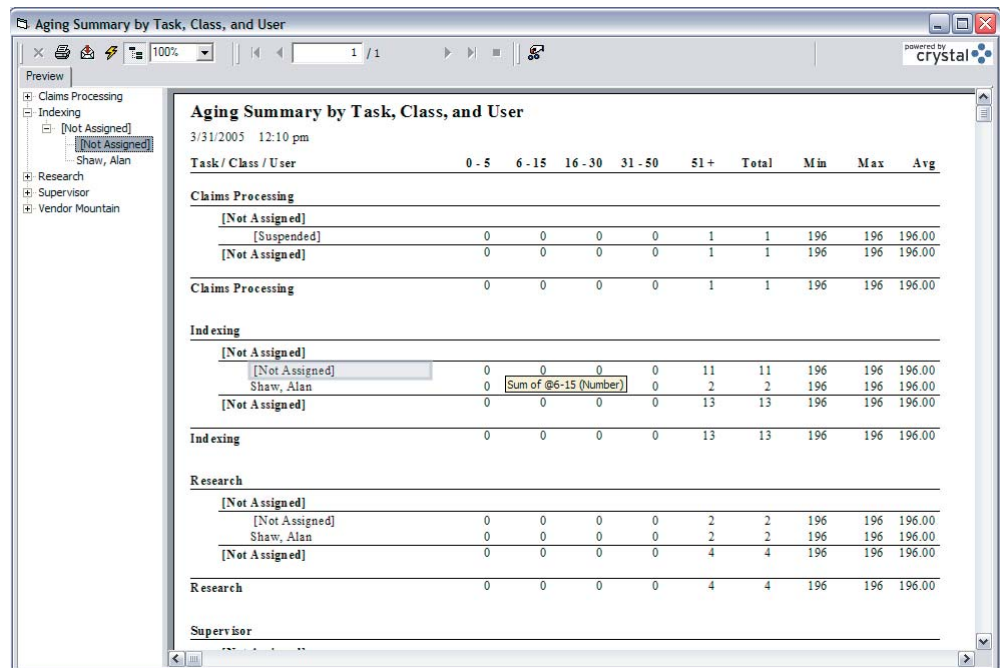
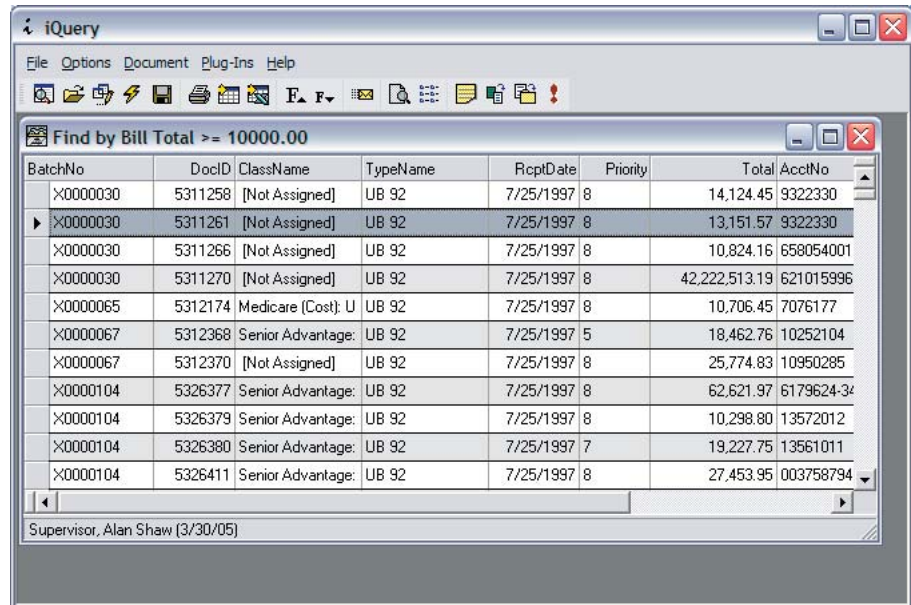
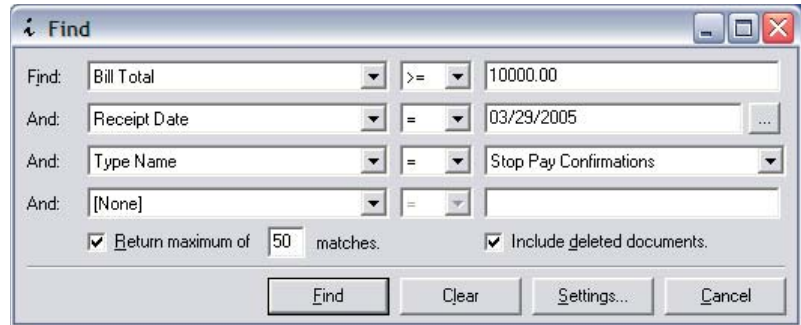
- Research notes, history, and inbox information.

- Export to Microsoft Excel or a text file.

- Leverage a central location for over 50 standard reports.

- Manage access rights for each report to control who sees sensitive information.

- Create custom reports.



iFolio

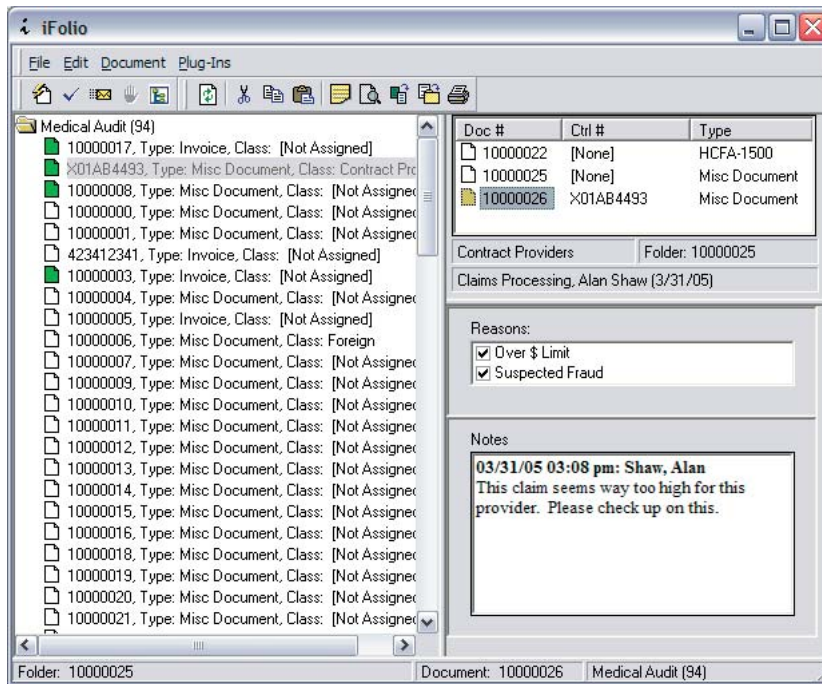
Multitasking has become a standard mode of operation in almost all business models. Your workflow environment needs to be flexible to accommodate the needs and expectations of multitasking production.

iFolio is perfectly suited for users who manage multiple tasks. iFolio sorts the top 100 documents in a user's inbox by highest priority and oldest receipt date, and groups documents by the tasks that need to be performed. This delivery method allows users to select the documents to work on, providing flexibility to prioritize documents as needed.

Documents are displayed in the tasks and documents field located on the left side of the iFolio screen. Folder icons represent tasks and page icons represent documents. Documents are color-coded to show documents assigned to you (green) and documents assigned to the task you are working on that are available for anyone to work on (white). Within the tasks and documents field, a user can create custom views to rearrange documents, such as sorting by client name.

The folder view field at the upper right of the screen displays all the documents located in the same folder as the document you have selected in the tasks and documents field.

The Reasons and Notes fields contain additional information about the document provided by the user who performed tasks with the document prior to sending the document to you.



iWork

Keeping your workforce focused on specific tasks and limiting distractions provides greater productivity and a streamlined work process.

iWork supports production work by assisting users who process documents one-by-one. It delivers a document to a user based upon the document's priority and receipt date. This application has a small "footprint" to free up limited screen space for other windows, such as the image viewer and the processing application.

Within iWork, documents are color coded to indicate the status of the document. A document that was delivered to you is coded yellow. A green document icon indicates the document is assigned to you. A document that shares the same folder but is not assigned to you and does not need to be worked on is coded white.

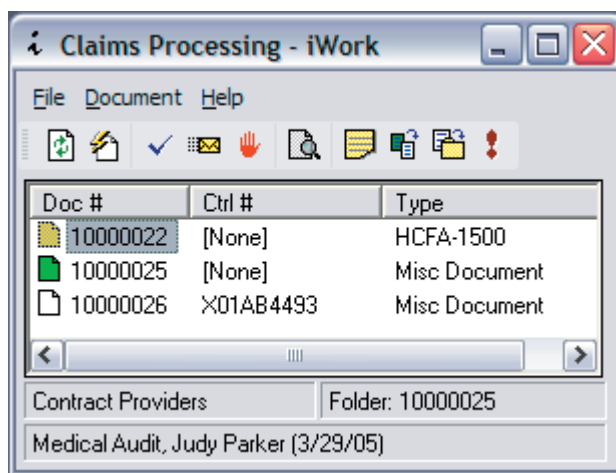


Image Viewer

Quickly accessing documents online creates greater productivity and can virtually eliminate misplaced documents. Providing convenient methods for viewing documents and making annotations keeps work hours productive and provides person-to-person communication without wasting critical work time.

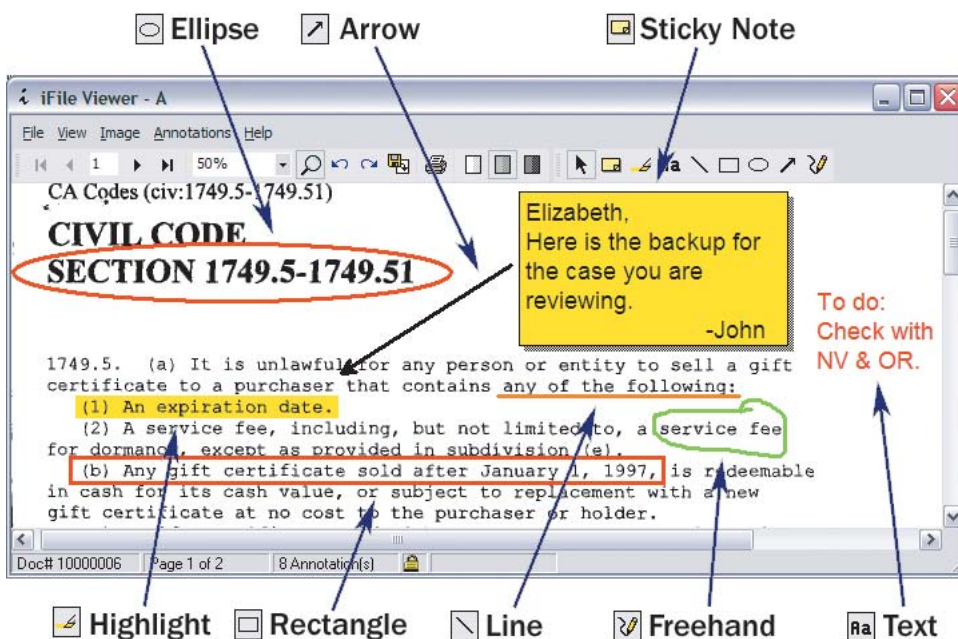
The heart of iFile is the ability to scan documents and then view and route those images. iFile supports one or more image viewers. Within an image viewer, you can open documents and switch pages. You can also rotate, zoom, print or annotate the image. The image viewers are controlled by the iFile applications and enable seamless viewing of images simply by clicking on the corresponding work items in iQuery, iFolio, and iWork. The image viewers offer these convenient functions:

- Quick page navigation by typing the page number directly into the toolbar or clicking on the navigation buttons.
- Quick and easy zooming and sizing of the document.
- Rapid scrolling through the document using the Pan Window.
- Advanced image manipulation features, including rotate, lighten, darken, smooth, and reverse, for a clearer view of document information.
- Secure annotations—in the form of sticky notes, highlights, and lines—provide increased visibility for important notes. (See sample annotations below.)
- Control printing via iFile Administrator. (Note: printing annotations is optional.)



Annotations are notes, lines, and shapes that can be added to a document to provide emphasis or call attention to an item within that document. Annotation tools include:

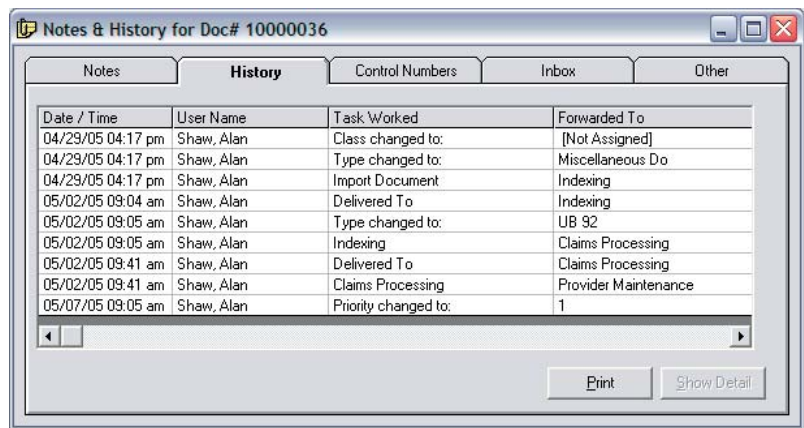
- Sticky Note
- Highlight
- Text Note
- Line
- Rectangle
- Ellipse
- Arrow
- Freehand Drawing



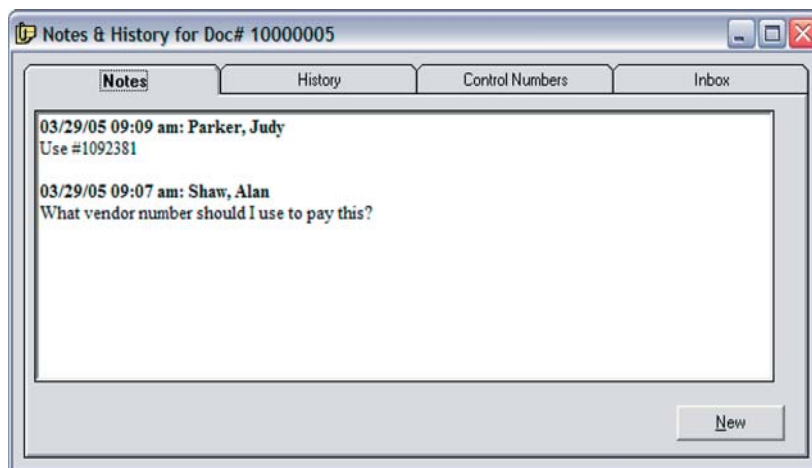
Notes and History

Accurate tracking of information and who has access to information is critical in workflow systems for industries dealing with sensitive and confidential data.

iFile maintains a complete audit trail for each document in the Notes & History window by tracking when and to whom documents are delivered and routed, as well as any changes made to the document type or priority. The Notes & History window maintains all notes, a chronological history of actions, a chronological list of indexed



| Date / Time | User Name | Task Worked | Forwarded To |
|-------------------|------------|----------------------|----------------------|
| 04/29/05 04:17 pm | Shaw, Alan | Class changed to: | [Not Assigned] |
| 04/29/05 04:17 pm | Shaw, Alan | Type changed to: | Miscellaneous Do |
| 04/29/05 04:17 pm | Shaw, Alan | Import Document | Indexing |
| 05/02/05 09:04 am | Shaw, Alan | Delivered To | Indexing |
| 05/02/05 09:05 am | Shaw, Alan | Type changed to: | UB 92 |
| 05/02/05 09:05 am | Shaw, Alan | Indexing | Claims Processing |
| 05/02/05 09:41 am | Shaw, Alan | Delivered To | Claims Processing |
| 05/02/05 09:41 am | Shaw, Alan | Claims Processing | Provider Maintenance |
| 05/07/05 09:05 am | Shaw, Alan | Priority changed to: | 1 |



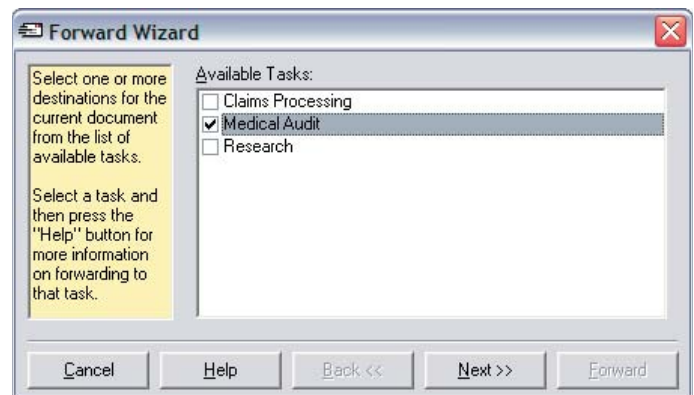
control numbers (such as a voucher number or claim number), and the task inbox to which the document has been routed and is currently assigned.

iFile also provides serialized notes that cannot be modified once they are saved. Each note is stamped with the user name, date, and time, providing a complete audit trail of communications for each document. Even notes that are attached during the document routing process will appear in the Notes & History window.

Routing and Suspending Documents

Ensuring that documents are routed correctly through your workflow process is critical to the success of your business. iFile has a variety of routing options, all of which are configurable.

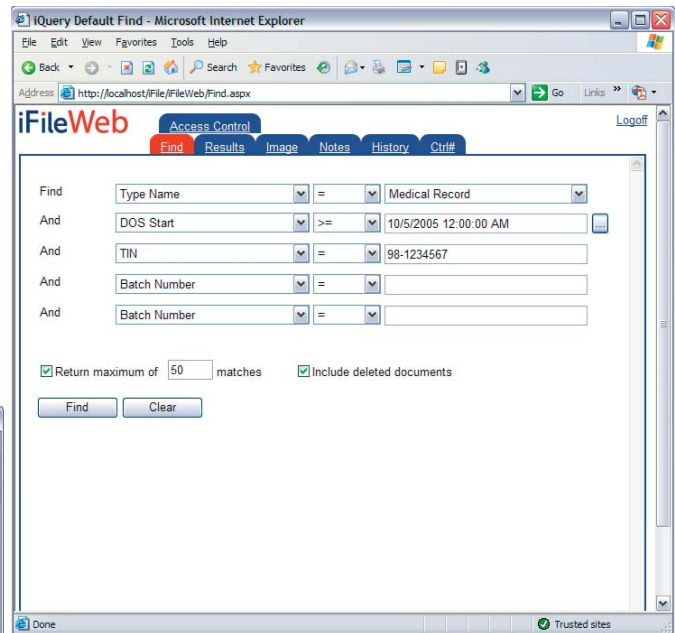
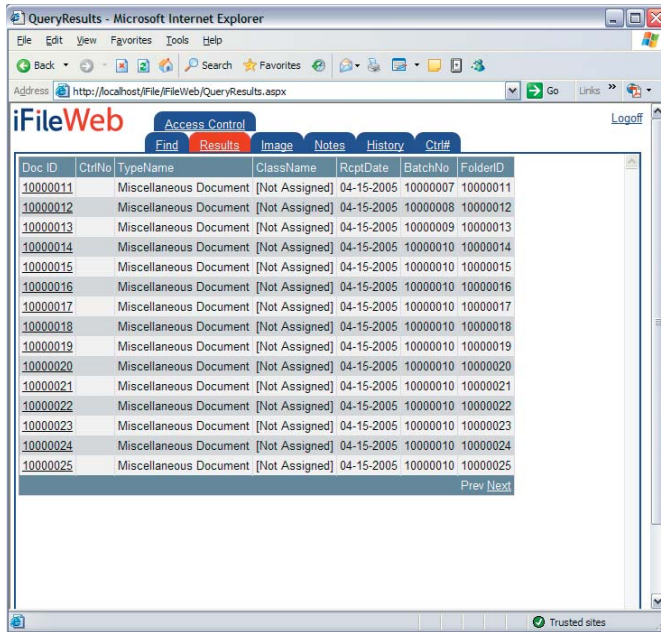
- The Forward Wizard allows users to:
 - Select one or more destinations from a list of available tasks.
 - Indicate the reason why the document is being routed to that task.
 - Choose routing options, including the ownership determination and drill-down routing lists, and the opportunity to send a document directly to an individual or to a task queue, where it will be load-balanced and distributed to the correct processor.
 - Attach notes that will appear to the user when the document is delivered.



- Suspension rules can be set for each task to specify how many times documents can be suspended (put on hold), and the number of days they can be suspended.
- The Recall Wizard enables users to:
 - Review and retrieve suspended work items.
 - Review and retrieve recently routed work items.
 - Retrieve work items using key fields.

iFileWeb

Secure, Web-based technology provides the opportunity to extend your company beyond the office walls. Whether employees are in the field or need to work from an off-site office, iFileWeb can allow members of your workforce to access documents and run reports remotely using a recognizable, user-friendly Web interface. Qualified users run Web-based iQuery data inquiries to view images, notes, and history information. In the field, this access is crucial for quick, on-site research and rapid retrieval of key information.



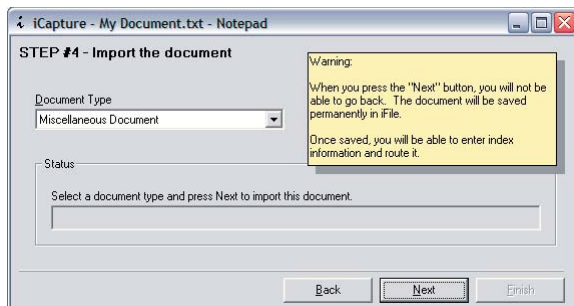
With iFileWeb, you maintain control of sensitive information because designated managers and supervisors manage access rights for iQuery functions and reports.

As your business grows, iFileWeb is an economical option for extending your operations to qualified business partners by utilizing their existing Internet services to access iFileWeb. Web-based functions provide the cutting-edge solution for secure, reliable, economic off-site expansion of your workflow process.

iCapture

For maximum efficiency, it makes sense to gather related information in an easily accessible format through your primary workflow system. With iCapture, your selected emails, documents from your legacy system, spreadsheets, word processing documents and other software program output are saved and placed into the iFile database.

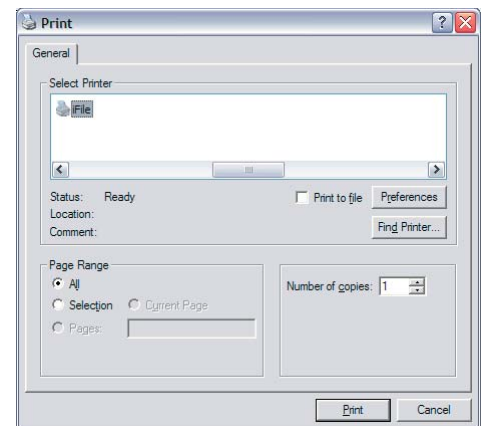
Using iCapture is as easy as sending documents to your printers. Simply select the “iFile” printer when printing from any application and the iCapture Wizard will walk you through the steps of creating and saving your documents in iFile.



Once the file is saved in iFile, you can index and route it.

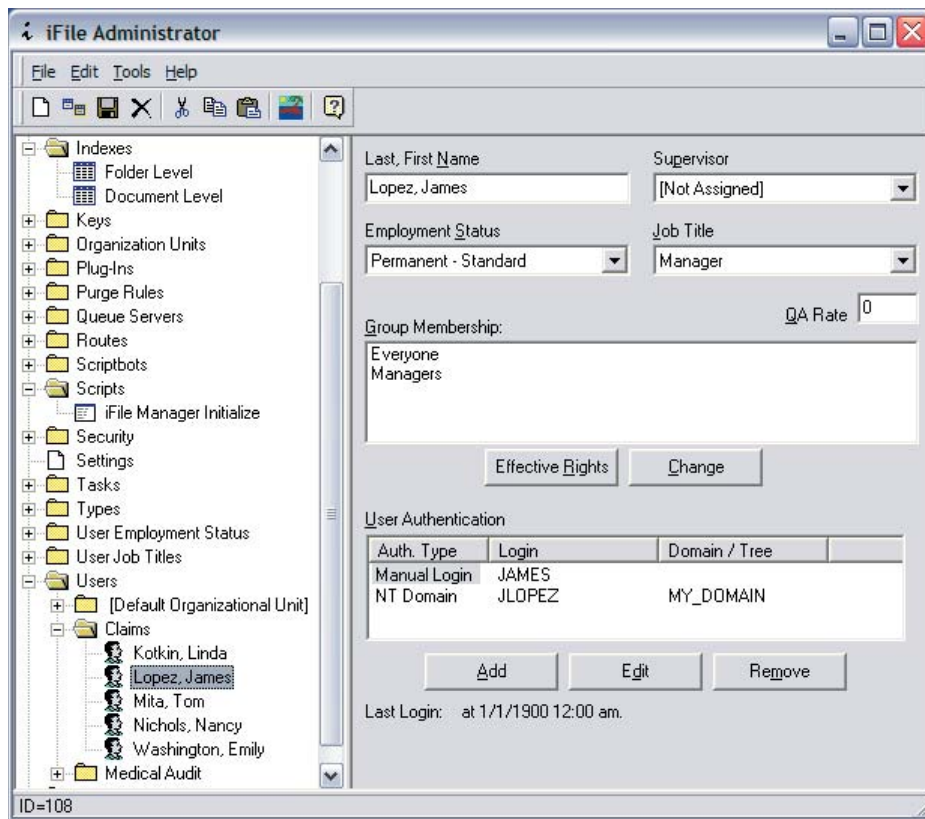
With the iCapture wizard, you can:

- Select a folder or create a new one.
- Index the document's key fields.
- Route the document to a particular task and user.



iFile Administrator (iAdmin)

Flexibility to customize hardware and software solutions to your business practices is a necessity. Almost every iFile feature can be configured using the iFile Administrator module. All modifications are logged and can be summarized in reports using iQuery. Security levels can be applied to prevent access to certain critical settings by normal administrative users. Below is a partial list of features:



- Automated Job Configuration
- User and Group Settings / Vacation Scheduling
- Task and Routing Configuration
- Fax Server Configuration
- Document Settings such as Types, Classes, and Storage Settings
- Security Settings
- Technical Configurations: Queue Servers, Licensing, Plug-Ins, and Custom Viewers

Additional Technical Information

| | |
|---|---|
| Supported Database Servers | Microsoft SQL Server 2000 or higher Sybase Adaptive Server 11.9.2 or higher (Unix/Windows) |
| Supported Image Servers | Microsoft IIS FTP Service on W2K or higher Other FTP Server (Unix/Windows) |
| Supported Web Servers | Microsoft IIS Service on W2K or higher |
| Supported Fax Servers | Captaris RightFax 8.5 or higher |
| iFile Application Servers (Queue Server, iFax, iGateway) | Microsoft Windows Server (W2K or higher) |

Individual server specifications will vary depending upon size and utilization of the iFile installation.
Contact FileWorks for detailed recommendations for your unique environment.

