

**FileVision** 

Information Relationship Management Software

## A New Type of Office Productivity Software

FileVision is a new type of office productivity software, Information Relationship Management. The power of FileVision lies in its ability to help organizations easily and strategically create relationships between important, disparate pieces of information.

The result? Improved communications, enhanced customer service and immediate access to information and relationships within the data.

- FileVision eliminates endless searching and expensive offsite storage.
- FileVision reduces administrative costs and inefficient data storage.
- FileVision improves workflow processes.

### How is FileVision Different?

Unlike existing office productivity solutions that fail to recognize or leverage informational relationships within an organization, FileVision bridges the gap between digital content and paper documents. FileVision helps organizations intelligently link and match documents to important data objects such as people, companies, processes and assets.

With FileVision, customers benefit from cost reductions associated with access to and retrieval of information, information storage, filing errors, document version control, workflow process management, reporting and auditing.

### One product, many solutions

FileVision provides all of the components needed to increase office productivity through complete management of documents and related data.

### The FileVision solution

- integrates comprehensive document and information management, imaging, workflow and information relationship management into an affordable, scalable and easy-to-use product.
- is ideal for any small to medium-sized business or department within an enterprise.
- incorporates implementation, consulting, and problem-solving strategies to assist customers in solving their unique business challenges.

[www.filevision.net](http://www.filevision.net)

## Powerful Information Relationship Management



### Relationship Management

FileVision's unique relationship management module offers complete flexibility through the creation of unlimited data sets that can be linked to documents. These data sets provide user-definable fields that can be used for searching and reporting. Documents, notes and actions can be linked to each record. The relationship management module also provides the ability to push documents and data to other users resulting in improved communications, enhanced customer service and immediate access to information and relationships within the data.



### Document Management

FileVision provides a graphically intuitive interface that automates the management of documents and their versioning, auditing and archive. Annotations, color-coded document status and multiple levels of security round out the feature-rich document management module.



### Imaging

FileVision has been designed to help clients easily capture and store documents for quick electronic access.



### Workflow

The FileVision Workflow module automates and monitors internal procedures, allowing critical path processes to be assigned to documents. With user-definable fields and flexible options, workflows can be easily configured for existing processes and provide improved and efficient task management along with multiple levels of accountability and control.



### Search

FileVision provides instant access to information through multiple search tools for documents, content, relationships and data. Documents can be quickly and easily found through user-defined key words and criteria or through full-text search. Relationship-centric searches can be performed using the powerful relationship management search tool.

## FileVision Advantages

### Reduces overhead and expenses

- Reduces administrative overhead
- Reduces communication costs
- Eliminates filing errors
- Eliminates multiple copies of the same documents
- Reduces audit and regulatory compliance

### Improves efficiencies and enhances customer service

- Enhances internal and external customer service
- Increases employee productivity
- Enhances employee communication
- Maintains filing consistency
- Improves business process efficiency
- Promotes informed decision making
- Provides rapid storage and retrieval of documents
- Ensures document confidentiality

## FileVision Works

Ideal for any small to medium sized organization or for multiple departments within an enterprise, FileVision has proven success in the following markets:

- Local government
- Community banks
- Healthcare
- Organizations that manage large quantities of paper and are process-intensive
- Organizations that require a secure environment
- AP/AR departments in a wide variety of industries

## Case Study

### Hart County Roads paves the way for improved customer service

"WE CHOSE FILEVISION BECAUSE IT QUITE SIMPLY MET ALL OF OUR CURRENT AND FUTURE NEEDS."

- Mary Hughes  
Information Technology Manager  
Hart County, GA

#### Overview of organization and solution goals:

- Reduce paper generated and time required to search for information
- Minimize risk inherent with paper document systems
- Minimize issues regarding the disintegration of important documents that cannot be destroyed (records, licenses, papers, etc.)
- Improve response time and provide better service to citizens and elected officials without the expense of additional staff
- Implement a scalable system to accommodate growth

#### Results achieved with FileVision:

- Eliminated 6 hours of time spent generating monthly cost reports
- 24/7 access to documents and data
- Immediate access to reports and automatic report generation
- Improved processes that positively impact ROI in the following areas:
  - Roads
  - Contracts
  - Certificates of insurance
  - Grants applications and administration
  - Beer and wine license applications

## Case Study

### Banking Start-up gets a jumpstart on information overflow

"WITHOUT FILEVISION, WE WOULD HAVE HAD TO OUTSOURCE MUCH OF OUR PAPERWORK. WE'RE NOT ONLY SAVING TIME BUT MONEY AS WELL."

- Sherrie Rogers  
Vice President  
Mountain 1st Bank & Trust

Overview of organization and solution goals:

- Enabled the banking start-up to take early, proactive control of information overflow in early days of venture
- Quickly store and retrieve shareholder and customer information and related documents

Results achieved with FileVision:

- 30-day ROI
- Improved customer service and shareholder satisfaction
- Increased information integrity and security
- Saved time by having the ability to quickly search and retrieve documents
- Increased information sharing among multiple branches
- Reduced administrative costs

### Platforms Supported

FileVision runs on the Microsoft Windows platform. It integrates with Microsoft Office applications and can easily interface with back office solutions via Web Services. FileVision is an enterprise level, multi-tiered application built in JADE. It is made up of an application server, a database and clients (Thin and HTML). FileVision offers complete flexibility when deployed across a network. It can be configured to meet the needs of a small workgroup or distributed across multiple servers to meet the demands of an entire enterprise.

## About FileVision

FileVision is a privately-held global software company that develops information relationship management software. Our solution, FileVision, enables organizations to bridge the gap between digital content and paper documents by easily and strategically creating relationships between important, disparate pieces of information. Government, healthcare and financial services organizations worldwide rely on our technology to help them 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.

FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit us at [www.filevision.net](http://www.filevision.net).

For more information, contact  
FileVision Authorized Reseller

Document Workflow  
Systems, Inc. **DWSi**

Document Workflow Systems, Inc.

28221 BECK ROAD, UNIT A-3

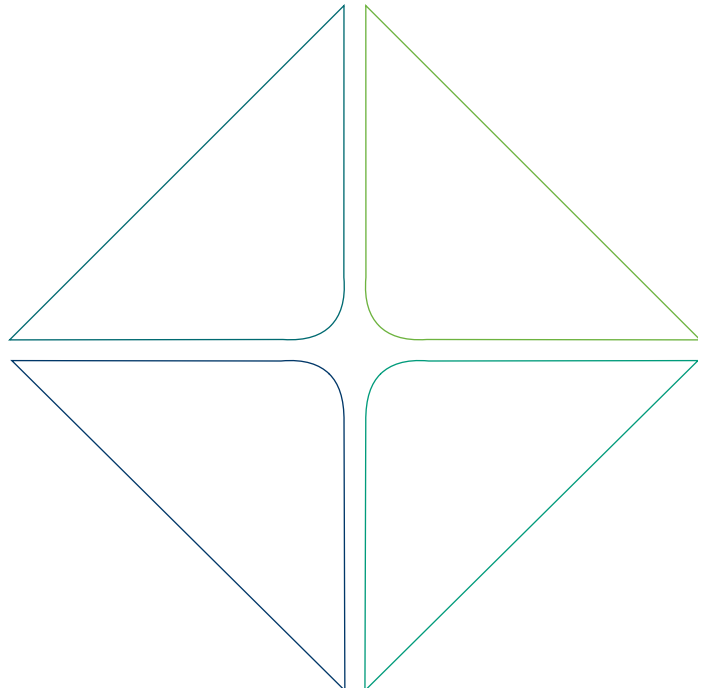
WIXOM, MICHIGAN 48393

PHONE: 800-870-8939

FAX: 248-449-9643

EMAIL: [DWSIFILING@DWSI.US](mailto:DWSIFILING@DWSI.US)

[WWW.DWSI.US](http://WWW.DWSI.US)





# FileVision Features

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

Unlike existing office 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 document concurrently
- View multiple documents concurrently
- Storage of both scanned images and electronic documents
- Version control
- User definable color-coded document status indicators
- Document printing
- Automate document archival
- 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

## Security

- Hierarchical security structure down to document level security
- Multiple annotation level security
- 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

## Imaging and Capture

- Distributed Scanning
- Batch scanning process
- Image clean-up
- Color scanning supported
- Fax capture
- Email capture
- Pre-defined index values
- Add keywords on the fly
- Electronic capture (edocs, multimedia, XML feeds)
- TWAIN compatible
- OCR
  - ICR
  - OMR
- Batch Release to Kofax Ascent Capture
  - 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

- 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
- Support escalation of tasks
- Supports task notification via Email
- Single click access to work
- Attachment of additional documents to a workflow

## Data Profiler

- Point and click field creation
- User definable, searchable and reportable data fields
- 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
- 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

## About FileVision

FileVision is a privately-held global software company that develops information relationship management 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 the data. FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit us at [www.filevision.net](http://www.filevision.net).

For more information, contact  
FileVision Authorized Reseller



## Document Workflow Systems, Inc.

28221 BECK ROAD, UNIT A-3

WIXOM, MICHIGAN 48393

PHONE: 800-870-8939

FAX: 248-449-9643

EMAIL: [DWSIFILING@DWSI.US](mailto:DWSIFILING@DWSI.US)

[WWW.DWSI.US](http://WWW.DWSI.US)



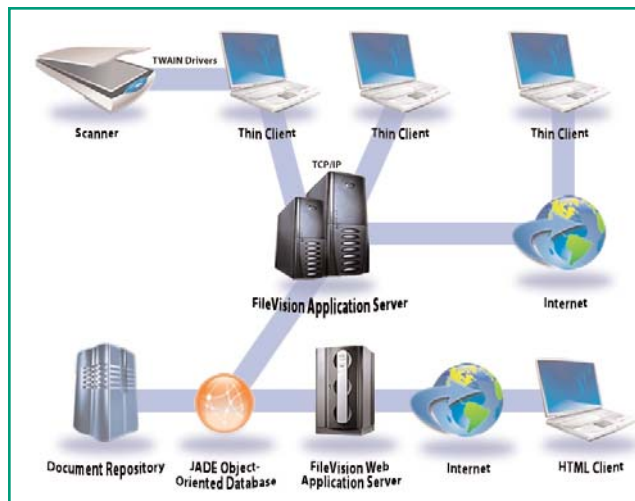
**Corporate Office**  
400 Perimeter Center Terraces  
Suite 110  
Atlanta, GA 30346 USA

T: 770-551-1400  
F: 770-551-1414  
Email: [info@filevision.net](mailto:info@filevision.net)  
[www.filevision.net](http://www.filevision.net)



FileVision is an enterprise level, multi-tiered application built in JADE. JADE is an application programming technology created to build enterprise-class transaction-based business systems. JADE comprises a rich, seamless development environment with a unique distributed computing environment and a powerful object oriented database.

The FileVision solution consists of the FileVision application server, the JADE database, the document repository, the thin client and the optional Web browser interface. FileVision offers complete flexibility in deployment across a network. It can be configured to meet the needs of a small workgroup or distributed across multiple servers to meet the demands of an entire enterprise.



### FileVision Application Server

The FileVision application server is the doorway to the JADE database and document repository for the FileVision Clients. The application server processes the business logic on the server and passes the presentation information to the Thin Client. This allows the Thin Client to efficiently operate over LANs, WANs and the Internet. Since FileVision allows the use of multiple application servers, the system can handle a large number of users without putting much overhead on the database. The application server can be installed on the same system as the database or installed across multiple computers to handle large configurations. In multi-application server environments, load balancing can be activated to ensure that no single server is besieged while others are sitting idle.



### JADE Database

The JADE Object Oriented Database (OODB) is a state-of-the-art, high transaction enterprise-level database engine. It is an open system that embraces and complies with industry-standard protocols ensuring compatibility with existing technologies in order to support legacy technology investments, access existing data, and keep future options open with emerging technologies. The JADE database is included at no additional cost with the core FileVision product.



### FileVision Document Repository

FileVision stores and manages files in the document repository. The document repository can be a single directory on the same machine with the application and database server, spread across multiple directories and file servers, or it can be a RAID or NAS storage device. All files are renamed and stored in their native formats and can be easily backed up.



### FileVision Web Application Server

The FileVision web application server is a bridge that allows much of the functionality of the FileVision thin client to be executed via a web browser.



### FileVision Thin Client

The FileVision Thin Client is the power user's client option. The FileVision Thin client is a true thin client that moves most of the processing to the application server. This reduces the amount of data that must be communicated to the client. The Thin Client is fast, light and enables you to run FileVision over intranets, dial-up lines, or the World Wide Web.



### FileVision Scan Stations

FileVision is compatible with most scanners that have TWAIN drivers. Scanners allow paper documents to be scanned and managed by FileVision. Scanned documents are encrypted and stored in the document repository. The FileVision Viewer is used to decrypt and view the stored images. Annotations can be applied and saved as multiple layers on the scanned document, each with its own access rights. Encrypted documents can be exported into non-encrypted formats and taken out of the repository if there is a need to distribute the scanned documents out of FileVision.



### FileVision HTML Client

The FileVision HTML Client allows users to access much of the functionality of FileVision without installing additional software on their desktop.



### Network

FileVision can run on any TCP/IP network. LANs with speeds of 100 Mps or greater are strongly recommended. Large configurations may require network segmentation for best performance.

For more information, contact  
FileVision Authorized Reseller



### Document Workflow Systems, Inc.

28221 BECK ROAD, UNIT A-3  
WIXOM, MICHIGAN 48393  
PHONE: 800-870-8939  
FAX: 248-449-9643  
EMAIL: DWSIFILING@DWSI.US  
WWW.DWSI.US

### Requirements

These specifications represent recommended minimum configurations. More powerful configurations may be advisable, depending on the scale and the performance requirements of your system.

### Application and Database Server Requirements:

- o Pentium III 450 MHz (or higher)
- o 512MB RAM
- o Windows 2000 SP4, Windows 2003 or Windows XP SP2
- o 1GB disk (For the database and FileVision server components. Total disk requirements are dependent on the number of documents you plan to store in the repository.)
- o 10GB Document Repository (Dependent on the number and types of documents you plan to store in the repository)
- o Network Interface Card (NIC) running TCP/IP

### Web Server Requirements:

- o Microsoft Internet Information Server (IIS) 2.0 or higher

### Thin Client Requirements:

- o 200 MHz Pentium (or higher)
- o 32MB RAM for Windows 98 or ME, 64MB RAM for Windows NT, 128MB RAM for Windows 2000 SP4 or Windows XP
- o SVGA monitor
- o 100MB free disk space
- o Network Interface Card (NIC)

### Thin Scan Station Client Requirements:

- o 300 MHz Pentium (or higher)
- o 128MB RAM for Windows NT, Windows 2000, Windows XP
- o 17 inch SVGA monitor (recommended)
- o 1GB free disk space
- o Network Interface Card (NIC)
- o TWAIN compatible workgroup, departmental or production level scanner\*

### HTML Client Requirement:

- o Internet Explorer 5.5 SP2

\* While FileVision is compatible with most TWAIN scanners many multi-functional and flat bed scanners are not appropriate for the capture of business critical documents.





## FileVision™ is just what the doctor ordered for InHealth

*Information Relationship Management System shortens the billing cycle, cuts costs and improves efficiency*

### Customer Profile

In business for more than 25 years, InHealth is a national sales organization that distributes record-keeping solutions and services to the healthcare industry. Headquartered in Atlanta, Georgia, InHealth has 360 employees with nine divisions delivering everything a healthcare practice needs to document a patient visit from the time the patient makes an appointment to the time they are billed for the service.

InHealth was looking for a document management and imaging system to help them get their arms around the massive amounts of paper generated by medical billing and human resources.

The company operates a growing medical billing service with billing (data entry) staff in multiple remote locations. InHealth struggled with the frustrating process of distributing paper documentation to remote personnel and returning the files to the corporate office for storage after the information was entered into the billing system. The inability to distribute work efficiently and cost-effectively kept the medical billing service from running as smoothly and profitably as it envisioned with an automated system.

In addition, InHealth's human resources department receives hundreds of resumes per month. The company has a strict hiring process with policies and procedures that must be followed. For instance, resumes must be kept for one year before they can be discarded. The paper-based system for handling the retention of resumes and applications took up valuable time and resources and led to the increasing need for more storage space.

The company set out to find a document management system to help improve efficiency, reduce costs and grow the business.

### Business Case

InHealth searched for a document management and imaging system that did not require them to change existing processes but rather would help them improve the efficiency of their processes. First, the company wanted to scan and keep all documentation for its medical billing service in one centralized location, quickly and efficiently distribute the work to the employees, and track their progress, holding them accountable for their work.

InHealth's medical billing service was a completely manual operation. Documentation was delivered (by courier or the employees picked it up themselves) to remote locations for data entry. With documents being distributed manually there was no method for staff members to share work without additional courier costs and time. The ideal solution would also provide the security features to help them comply with company regulated information protection.

According to Sue Kay, vice president of InHealth, "If the workload for a practice increased or a biller was unable to complete their work, redistributing the work was an administrative nightmare. It was also difficult to manage the remote employees because there was no way to check on the progress of their work other than by phone." To be profitable with medical billing you must service a lot of clients, with the minimum number of data entry staff. In other words, you have to keep overhead costs down. Therefore as the company added new clients, additional staff had to be hired to handle the workload.



*InHealth uses FileVision for more efficiency and shorter billing cycles*

Human resources needed a system that would allow them to keep track of the numerous files and documents associated with the recruitment of new employees. Often they wanted to know why individuals failed the hiring process, which meant they needed a system that allowed them to easily find and track related interview documents, such as resumes, phone skill sheets and other tests given during the hiring process. In addition, they needed to run reports and pull statistics related to how many recruits actually fail and what point in the process they failed. This type of analysis helps the human resources team easily determine when or if the interview process needs to be updated to be more effective.

Finally, they looked for a system that would help keep their information secure and in compliance with company regulations for employee information.

### Solution and Benefits

InHealth chose FileVision USA's Relationship Centric Document Management system to address the company's medical billing service and human resources practices. With FileVision, InHealth scans and keeps all documentation for its medical billing services in one centralized location, quickly and efficiently distributes the work electronically to remote employees, electronically tracks their progress, and holds each team member accountable for their work.

With FileVision, InHealth has completely cut the lag time and courier expenses involved in getting documents distributed to the remote billing staff. Now the documentation is distributed electronically to remote employees. By checking a notice board for each health practice, management easily tracks the progress of each employee's workload. The medical billing staff shares responsibility for all health practices for which the company handles billing.

"Where we once distributed work to one individual who was assigned to input information for a particular doctor's office, now the work is distributed by job function. One person posts all charges, someone else posts all payments and another follows up on insurance. This is a much more efficient way to handle the workload and has increased efficiency and turnaround time", stated Sue.



In addition, InHealth can now accept new clients without having to add staff to handle the work, making the medical billing services division more profitable. InHealth also plans to offer FileVision software and scanning capability to their clients to use. This will further cut down on the lag time in getting patient information to InHealth for processing.

FileVision has been implemented at Inhealth in medical billing and human resources with a positive return on investment:

- Distributing workload evenly and efficiently
- Monitoring remote employee progress
- Conserving physical storage space
- Reducing overhead

The human resources department uses FileVision to keep track of the tremendous paperwork generated during the recruitment of new employees. From the first phone interview to initial meetings, suitability testing, to making an offer, a significant amount of paperwork is generated for a new hire. That information must be kept for one year whether InHealth hires the individual or not. With FileVision, InHealth keeps track of all new hire information electronically, which has cut down significantly on paper shuffling and storage and allows them to easily retrieve information and run reports on potential recruits and hires. Also, FileVision helps them keep employee information secure and in compliance with company regulations.

Among the steps taken in the recruitment process is a test to determine an applicant's aptitude for the job for which they are interviewing. Not only are test results used to determine hiring eligibility, but also to help manage employee performance. Once an individual is hired, if there is a performance issue that has to be addressed, the test results give managers greater insight into potential issues and ideas for performance improvement.

#### Implementation

InHealth chose FileVision because of its flexibility and scalability. They wanted a system that not only handled their current processes but would also grow with the business. In addition, they needed to get started right away. With FileVision they were installed and up and running within two short weeks.

According to Sue Kay, "FileVision has a staff of experts with the unique ability to walk into a business, spend a couple of hours and quickly understand the flow of work and how to apply the FileVision solution to the process. Other document management companies didn't understand the importance of workflow. Several companies wanted us to look at their software and tell them how we could modify our processes to work with their solution. The FileVision team took a look at our processes and demonstrated how FileVision could make our existing processes more efficient."

InHealth is very pleased with the legwork the FileVision implementation team conducted upfront. This enabled them to make the best use of their training and implementation time. The implementation team brought InHealth's remote employees in to the corporate office where they held five days of training. At the end of the five days, the departments were up and running smoothly.

Sue and her team chose a "from this point forward" implementation strategy. In other words they did not do a back file conversion. They simply did not want to put the strain on their resources. Sue thinks the immediate benefit is in the improvement of the workflow process. However, she also understands the company will soon begin to reap the numerous benefits of having their information stored for easy access and retrieval.

#### Future Plans

InHealth plans to implement FileVision throughout its corporate headquarters but will eventually begin using it in the other divisions of the company. For instance, they currently send overnight mail packages weekly to their remote sales team to keep them up-to-date with the latest sales and marketing information. FileVision will allow them to make the sales information available electronically, which will reduce expenses and improve the efficiency of their sales force. In addition, they plan to use it in their accounting department allowing them to easily track purchasing and payments.

#### About FileVision

FileVision USA is a global company that provides a relationship centric document management and workflow solution, along with business process management consulting services. Relationship centric document management transcends the boundaries of traditional filing systems by providing users with a unique perspective that allows them to manage their documents with insight to other essential related information. FileVision is headquartered in Atlanta, GA with offices in the UK, Australia and New Zealand. For more information, please visit us at [www.filevision.net](http://www.filevision.net).

For more information, contact  
FileVision Authorized Reseller



Document Workflow Systems, Inc.

28221 BECK ROAD, UNIT A-3

WIXOM, MICHIGAN 48393

PHONE: 800-870-8939

FAX: 248-449-9643

EMAIL: [DWSIFILING@DWSI.US](mailto:DWSIFILING@DWSI.US)

[WWW.DWSI.US](http://WWW.DWSI.US)



Corporate Office  
7000 Central Parkway  
Suite 550  
Atlanta, GA 30328 USA

T: 770-551-1400  
F: 770-551-1414  
Email: [info@filevision.net](mailto:info@filevision.net)  
[www.filevision.net](http://www.filevision.net)