

### Introducing FileBound

Have you ever had to search for a file that isn't where it was supposed to be? How much time, money, and lost productivity did that experience cost you? Are you looking for a solution that will allow you to gain control of your critical documents and information, build records management process, and to be able to scale your business to comfortably handle growth? FileBound provides you with the tools and flexibility to build the right records management solution for your organization. Whether your needs call for tracking active paper files, managing archival storage, implementing a comprehensive document imaging system, or all of the above, FileBound is the right solution for you.

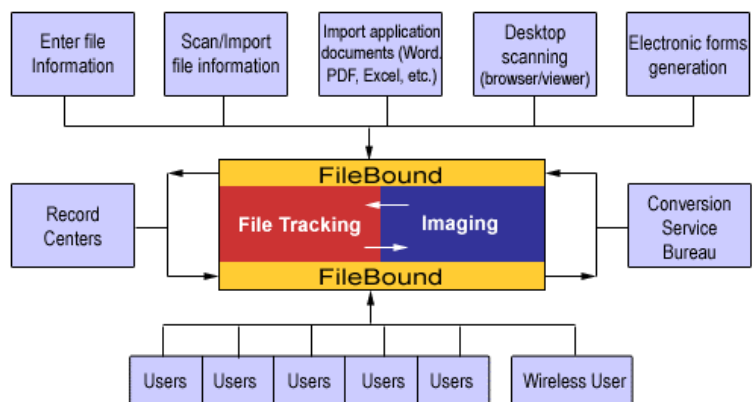
FileBound addresses all areas of records management, uses the latest technology and development techniques, and stores the images and information in a world-class data center. The underlying architecture allows FileBound to accept any object in any format and track it anywhere. It is designed to change and adapt as your needs and requirements change.

#### Overview of the FileBound workflow.

We define records management as the systematic management of an active paper document, documents and files stored off-site and documents converted to digital images. FileBound allows you to take an unbiased approach to the document storage and retrieval methodology employed for any application.

The power of FileBound is its simplicity, ease of use, and low cost. FileBound addresses the issues Record Manager's are required to deal with on a daily basis.

**Workflow Diagram**



Listed below are some of the key features in FileBound.

#### System Overview

- ASP solution means there is no technology to buy, hence no capital expenditure or on-site technical expertise required. Software updates are done on the web server and are automatic. No end-user involvement required.
- As a web based solution, FileBound is inherently multi-user and operates in a real-time mode.
- Standard license is for an unlimited number of Users.
- FileBound Data Center is in a world-class facility.
- Available as an ASP solution, In-house solution or combination of both.
- Supports imaging, electronic forms, workflow, file tracking, box storage, microfilm indexes, video, audio, PDF, Word, Excel and other objects.
- Supports unlimited projects or applications
- Robust Administration module so the End-User is in complete control
- Additional modules include:
  - Workflow
  - Electronic Forms Generation
  - Electronic Medical Records
  - Lab Process Workflow
  - Transcription Approval Processing
  - Web Coding

## Part 1 – Imaging System Highlights

### Image Retrieval/Viewer

- Complex search capabilities – Saved queries, global searching, multi-field searches
- Full text OCR search
- Easy to use interface
  - Toolbars, menus, thumbnails, mouse, printing, e-mail and keyboard facilities
- Private viewing area (Clipboard feature) for auditors or other people outside the organization. This private area allows the user to view only the images presented to them and no access to any other part of the system
- Request images from record center, service bureau or off-site facility
- Comprehensive functionality
  - Find File, Save, Print pages, E-mail pages, Zoom Area, Zoom In, Zoom Out, Fit to Width, Fit to Height, Best Fit, Rotate Clockwise, Rotate Counterclockwise
  - First Page, Previous Page, Next Page, Last Page, Drag Bar
  - Thumbnail view
  - File Dividers (security rights by divider option)
  - Annotations - Notes, highlights, arrows, lines, squares, redaction, etc.
- Memory and file caching for fluid document browsing
- XML functionality allows many operations to be performed quickly and easily
- Requirements Internet Explorer 5.0 or above
- Image Viewer and images can be archived to CD/DVD
- View foreign documents (Word, PDF, Excel etc.)

### Data Manager

- Easy to use, simple and intuitive
- Comprehensive Functionality
  - New File, Rescan, Insert, Save, New Batch, Delete
  - Page Up, Page Down, Rotate Clockwise, Rotate Counterclockwise, Reorder Pages, Drag-and-Drop
  - Zoom In, Zoom Out, Fit to Width, Fit to Height, Best Fit
- Automated Batch Upload and/or Timed Upload for posting to the Internet
- Retrieval Manager feature allows for scanning and posting User requests via low level workflow functionality
- Add documents such as Word, Excel and PDF
- Automatic scanning via bar-codes, page count and blank pages
- Simple and quick indexing functionality
  - Select indexes from database or import file
  - Add index records at time of capture
  - Index at a later time
  - Automated bar-code index capture
  - Full text OCR
- Supports TWAIN or ISIS scanners.
- Direct TWAIN support
- Imports from other scanning programs or Conversion Service Bureaus
- Create CD's or DVD's with full function viewer, images and indexes
- Import other file types
- Archive Manager
  - Create and restore independent CD volumes
  - Built-in backup methodology

## Part 2 – File Tracking System Highlights

### Parameter driven

- Custom index fields - Text, numeric, Option Lists, Auto-Counter, Date/Time and Terminal Digit field types.
- Checklist and Task List feature. Simple checklist to manage mandatory file documents, advanced checklist feature assigns responsibilities and deadlines.
- Custom Reason fields (reason for checking a file out). Example - Client Visit, File Update, Audit, etc.
- User Maintenance - The Users can then maintain and update their own passwords and set user preferences.
- Group Maintenance - Clients can designate Groups that link access security levels and system wide capabilities.
- Vendor Maintenance - Client can setup complete Vendor files for integration and interaction with their microfilming, scanning or record center vendors.

### HIPAA Compliant

- Tracks Patient Privacy Policy version as required.
- Track routine and non-routines usage as required.
- Track and generates reports of all file activity.
- File notepad for Patient "opt out" incidents.
- Complete records management program.

### Comprehensive Report Generation

- Login Report, File Activity Report, File Inactive Report, File Destruction Report, Pending Request Report, File Inventory Report.
- Compliance with regulatory agencies.
- Administrators have the ability to generate reports on either user or file activity.
- Be instantly up to date on status of all files.
- Complete history tracking.

### Print Bar-code labels

- FileBound is fully integrated with the industry leader, [www.netlabels.com](http://www.netlabels.com). NetLabels.com prints labels for folders and documents, to link the management of paper and digital-based records, providing maximum integrity for all of an organization's information assets.

### Records Retention Schedule

- Client can enter a Destruction Date and pull a File Destruction Report.

### User status and information is displayed upon login

- The User gets a summary of all files that are checked out to them and the files they have requested. The detail information is displayed.

### Search capabilities

- The user can search on any field or multiple fields simultaneously with partial index values.
- Complex searches such as "and/or" criteria.
- Full Text OCR searches.
- Search results displays all index values with current file status (checked out etc.).
- Search for Boxes/Containers or files in a Box/Container.
- Microfilm Index tracking and retrieval.

**Batch Functionality**

- Batch Checkout/Transfer - Used to move large number of files to Record Center, Conversion Service Bureau or second location. Used in a scenario when a Users make file request and all requests are transacted through a central file room.
- Batch Checkin - This provides an operator with the ability to checkin multiple files as a streamlined process.
- Batch Request - Designed for Users at remote locations. They can optionally request hardcopy, fax or digital (need Request Manager module). Designed for use by the central file room or individual users to request multiple files with a single transaction from a Record Center, Conversion Service Bureau or second location.
- Batch Print NetLabels - Select Label Style then batch print color-coded labels. Fully integrated.

**File Functionality**

- New File Entry - Allows the User to enter new file information for one or multiple files. Importing of file information allows for new Clients to add their existing database in an automated process. Optional Box or Container entry. Records added to the FileBound database can have corresponding labels printed for file folders and documents.
- File Request - A user can create a file request for a file that currently is not available. Reserve files for when you know you will need them. The user is notified via e-mail when the file becomes available.
- File Location - The system tracks the current location of any file whether it is in the file area, checked out to a user, or has been archived to storage or another media type. Eliminates time consuming manual searches.
- File Transfer - File ownership can be transferred from one user to another.
- File Checkout - A file can be checked out to any authorized registered user or location.
- File Check-in - The check-in routine is as easy as two bar code reads. First read the file ID bar code and then the check-in function bar code.