FileOptics

ELECTRONIC DOCUMENT SOLUTIONS

FileOptics' Enterprise Content Management System gives you **information at your fingertips.**

Achieve direct, efficient access to information within your organisation. No more wasted time waiting for paper files, searching for emails, documents and spreadsheets or holding up critical processes while information is collated. Using simple search functions, you and your staff can instantly retrieve all the information you have about a customer, project or topic.

By implementing FileOptics you will realise the following benefits:

- **Cost savings** by eliminating the need to print, file, and maintain paper records. All records, regardless of file type, can be stored electronically.

- **Process efficiency and decreased turnaround times** by giving all staff access to business critical information via their desktop. Remove the wait time to retrieve paper files or compile records from disparate systems. Staff, regardless of their geographic location can retrieve records instantly using a simple yet powerful search function, directly from their desktop. All records are stored centrally yet viewable by multiple staff concurrently at different locations – FileOptics offers you a "one stop shop" for all business information.

- **Deliver consistent outcomes** to your customers, and suppliers using automated document centric workflows which ensure documents go to the right person at the right time, all while removing paper. You can eliminate manual document handling and monitor workflows to ensure you meet critical business milestones.

- **Business continuity.** As your records are stored electronically, you can access them via a web browser regardless of your physical location. Your business can continue despite your offices being inaccessible due to fire, flood, earthquake or cyclone damage.

- **Peace of mind** that you meet your regulatory and quality assurance obligations to retain and manage critical business information appropriately.

Features

FileOptics delivers these benefits and more, through its fully integrated content management suite that comprises the following features:

CAPTURE → INDEX → ARCHIVE → PROCESS → RETRIEVE

WORKFLOW

INTEGRATION
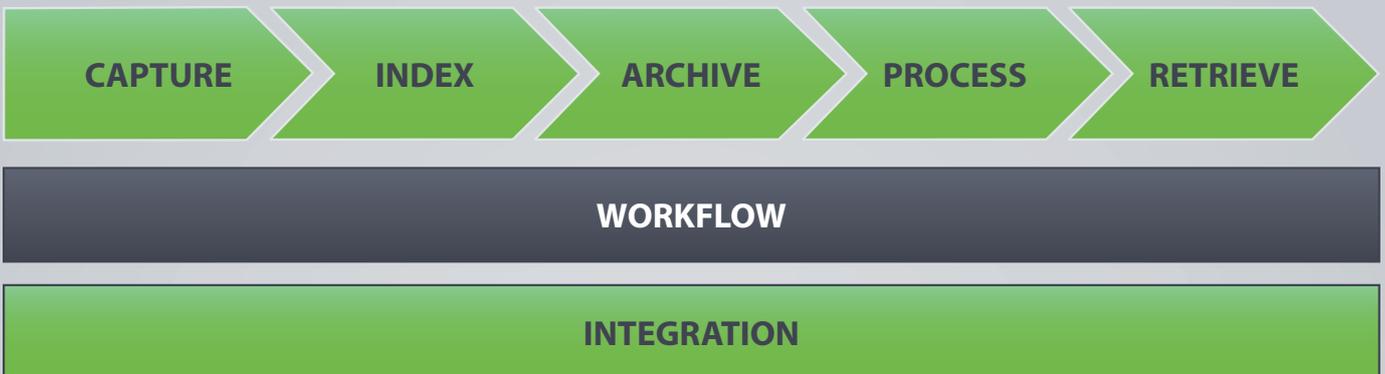
▶ Capture

FileOptics allows you to capture records of any type and store them in the archive, *before* they are printed on paper. Common record types include the following:

Online records – Support online transactions by providing a repository for all records received and produced via your web channels. Records may include forms, plans, contracts, correspondence, photos or reports

Paper records – Quickly and easily convert paper records using FileScan. Imagine having records available instantly, with no wait time typically associated with paper records.

MS Office documents and emails – Archive Word, Excel and Outlook files directly from the application. Capturing records where they are created, before they are printed, eliminates double handling and encourages your staff to record all business information in the archive.

System reports – Import reports directly from your operational system to FileOptics. Workflows can automatically notify you when reports are ready for review and approval.

Other records – Store other records such as video or image files, PDFs and the like through the FileArchiver module that resides on the user's desktop. Simply drag records for archival onto the drop box and all information about a project is available in FileOptics.

▶ Index

So you can retrieve records quickly and accurately, FileOptics indexes each record as it is entered into the system. The system can be configured to do this automatically using document specific attributes such as document type, customer number, account number and the like. Automatically or manually depending on document origination and format. FileOptics also offer OCR and bar code recognition.

Archive

FileOptics assists you to meet your regulatory and quality assurance obligations to retain documents and manage records. Once a document is stored in the repository, it is retained as the original document for evidentiary purposes. Copies can be created of the document which can be edited and resaved, but the original is always retained in the archive.

FileOptics provides several flexible modes for housing your archive. It can be hosted internally, through a bureau or by FileOptics and accessed through a web browser.

Process

A feature of implementing FileOptics and moving to electronic documents is the immediate emphasis this places on the business processes within your organisation. An inherent effect of documents being electronic is that the processes associated with that document become streamlined. Inefficiences in processes are naturally highlighted and potential improvements identified.

After these improvements have been made, the next step can be to take advantage of automated workflows.

Retrieve

Quickly and accurately access any record in the archive using FileOptics' FileView. FileView provides powerful search capability enabling a combination of search parameters to be used as well as providing partial match searching.

You can retrieve all records in a document cabinet or use document specific attributes such as customer name or project reference to restrict the search. FileView's search features ensure that document retrieval is fast and accurate.

Workflow

FileOptics' workflow module, FileFlo, lets you automate document centric processes and monitor their performance. It gives you the power to take control of your information flows, eliminate manual document handling and ensure you are meeting your KPIs. Automated workflows can be designed to create tasks, assign tasks to staff members, and record timeframes for completion. FileFlo provides a wide range of business performance information that can assist in improving your organisation's overall performance.

Integration

FileOptics' open architecture offers well documented interfaces to third party systems including CRMs, HR and payroll systems, operational systems, internet banking portals and other applications such as SharePoint. The system uses non-proprietary integration protocols which ensure that interfaces are seamless and easy to maintain.

SharePoint - With the rise in popularity of document collaboration systems such as SharePoint, FileOptics International has developed a pragmatic integration strategy. By integrating SharePoint with FileOptics, you can reduce the load on SharePoint databases thereby optimising performance while still retaining valuable documentation in the FileOptics archive.

Why FileOptics?

Impressive track record

FileOptics International is a stable company with a twenty year history of providing quality document management products to organisations across a diverse range of industries.

Proven product

FileOptics is a robust, scaleable product, currently implemented in sites across Australasia and North America. It is suited to organisations of all sizes - from small companies with less than 20 staff to large firms with thousands of staff and millions of archived records.

Low entry cost

FileOptics has an annual licensing fee that does not restrict the number of records stored in the archive. To get started, you simply need to define the attributes of your records and you are ready to start using the system.

Further, you can use your existing in house scanning devices to convert paper records. There are no extra licensing costs to use the FileScan module.

User friendly, intuitive user interfaces

FileOptics interfaces use standard Microsoft and web navigation conventions so they are familiar and easy to use with little user training. Ramp up time for your staff is therefore minimal and user acceptance is high following implementation.

Low risk implementation

Using a proven implementation approach, you can be confident of a successful and seamless deploymentby FileOptics' experienced implementation team.

Contact Us

For more information about how FileOptics can assist your organisation please contact us at:

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