



# FileHold

## Reporting Capabilities

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## Introduction

The purpose of this paper is to explain the FileHold approach and capabilities relative to “reporting” within FileHold Document Management Software (DMS).

Business information such as contracts, strategy documents, HR records and accounting archives are found in every company. These documents can be a burden if not managed correctly. With FileHold “paperless office” software they become a secure usable asset. FileHold software is designed to store and protect the Intellectual Property (IP) a business has worked so hard to create. This IP is made useful by being secure and accessible but even more importantly it can become “Business Intelligence” if it can be reported on. FileHold makes all of the information in the repository searchable and reportable via the web, extranet or internal network.

Many standard reports are provided as a feature of the FileHold product but an infinite number can be created using the Microsoft® SQL Server™ 2005 Reporting Services platform. This reporting capability can also be integrated with the Windows SharePoint Services 3.0 via web parts.

## FileHold Standard Reports

Many reports are used every day and are a part of the core FileHold product offerings. These include:

- Document Activities Report – Lists all document activities (i.e. check in out and by whom)
- Library List Report – An overview of all cabinets, drawers, folder groups, folders and documents
- System Activity Report – Lists all login and attempted log in activities
- Active Workflows Status Reports – A family of reports presenting statuses of currently active workflows by various criteria
- My FileHold Status Reports

## FileHold / Microsoft® SQL Server™ 2005 Reporting Services

FileHold determined that no matter how many pre-formatted reports it provided, it would never satisfy the need for the varying demand from our customers. Since FileHold stores all metadata fields in the SQL server database FileHold chose to work with the Microsoft reporting tools that come standard with Microsoft SQL2005. This tool allows FileHold customers to generate their own reports using a standard supported reporting platform.

The reports are developed using the Microsoft® SQL Server Business Intelligence (BI) Development Studio which installs with the SQL 2005 Database Server or can also be created using Microsoft® Visual Studio 2005.

Microsoft describes this reporting capability as follows:

*“Microsoft® SQL Server™ Reporting Services is a complete platform for creating, managing, and delivering reports from a variety of data sources.*

*Reporting Services offers comprehensive functionality for processing, formatting, and rendering data in a variety of traditional and interactive reporting formats. Applications can take advantage of Reporting Services functionality in many ways, from accessing an existing report within an application or portal page, to embedding report processing and design capabilities within a stand-alone application.*

*SQL Server Reporting Services is designed to be programmable and extensible. Report definitions use a published, extensible XML-format called Report Definition Language (RDL), and Reporting Services offers a Simple Object Access Protocol (SOAP) Web service for managing and accessing reports.*

*With SQL Server 2005 and Microsoft® Visual Studio® 2005, Microsoft has extended the ways in which developers can integrate and access Reporting Services functionality. For detailed information about the product, see the product documentation and also the resources available online at <http://www.microsoft.com/sql/reporting/>.*”

Once the report is developed and tested it can be deployed to the SQL 2005 Report Server and be viewed in different ways:

- As a Custom web page integrated into a web application.
- Via the SQL Server Reporting Services Home Page. Once on the home page users can navigate to the FHReports folder and select a report to view.
- Through a FileHold library administration page via Reports node in the tree view.

## Real World Example

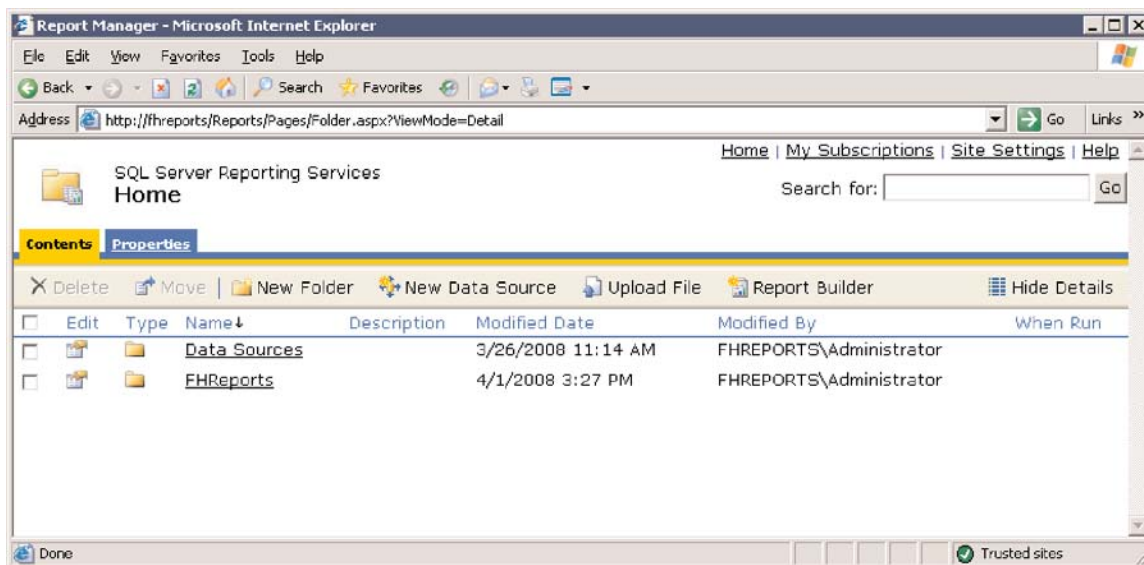
This example is a property management company that is using the FileHold repository to store property rental contracts and leases. In the past they had file cabinets with this documentation (tenant information, references letters, drivers license ID, disputes etc.) and kept separate spreadsheets of information about contract expiry. Now they keep all of these documents in electronic form. They use document scanning complete with OCR to make the documents searchable. They are starting to put some forms on line and capture electronic signatures.

While setting up the system and storing the documents the customer created compulsory metadata fields to record: tenant name, contract start date, monthly payment, contract end date etc. As they electronically store these documents they also capture all of their metadata “tag” information in FileHold and subsequently the SQL Database. It is now possible to search for any tenant information based on both the content of the documents and the metadata information. Using SQL reporting services this metadata can be “mined” to capture business intelligence.

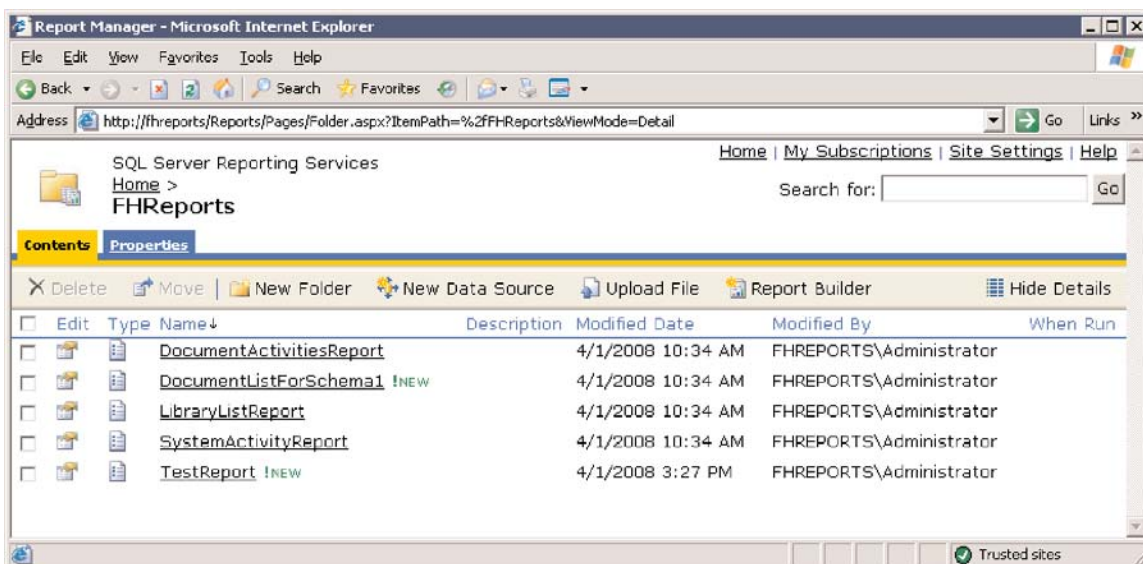
For example: If this property management company wanted a report that shows tenant name and the expiry date of their current lease. This report can be created by FileHold engineers or a knowledgeable IT person using the SQL reporting services. Once the report is created it can be refreshed by the user as needed and exported to an application like Microsoft Excel. The property management company now has a modern way to track tenant information and lease expiry dates.

## Example - SQL Server Reporting Services

This is an example of reports generated using the SQL Reporting services home page. The Data Sources holds the shared data sources and the FHReports folder holds the list of available reports.



By clicking on FHReports the following screen of report options will be displayed.



## Conclusion

A good software solution is measured by the level of business intelligence it can provide. Good business information leads to good business decisions. FileHold records management software provides powerful reporting capabilities that generate business intelligence.

For more information visit: [www.filehold.com](http://www.filehold.com) or contact [sales@filehold.com](mailto:sales@filehold.com) Tel. 604-734-5653