



FileHold

Numbering and Versioning

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Introduction

“Out of the box” FileHold provides its customers with many options for document numbering and version control. FileHold has a very flexible and user configurable design to accommodate different industries that have different requirements for numbering schemes.

Some numbering requirements are based on historical work methodologies and some are based on specific industry requirements and for compliance. The purpose of this white paper is to help describe all the ways that FileHold can help solve the business problem of uniquely numbering and versioning documents.

In addition to the formal numbering / versioning solutions that FileHold provides there is near infinite numbering / versioning possibilities using the FileHold metadata fields. FileHold metadata fields are flexible, controllable and searchable to allow users to create numbering schemes they may require. One possible use of metadata field numbering would be to store unique document numbers that might have been inherited from a legacy document management or even paper based filing system. By replicating these numbers in the FileHold metadata fields users can continue to search and find their documents based on the numbering scheme from a previous system.

Using the FileHold reporting services (based on SQL 2005 reporting) all metadata fields are reportable so there is unlimited flexibility to generate reports based on any custom numbering systems a customer may wish to develop.

The following is a brief description of each of the document number or version control schemes that FileHold provides as a standard “out of the box” feature.

FileHold *Bates* Numbering

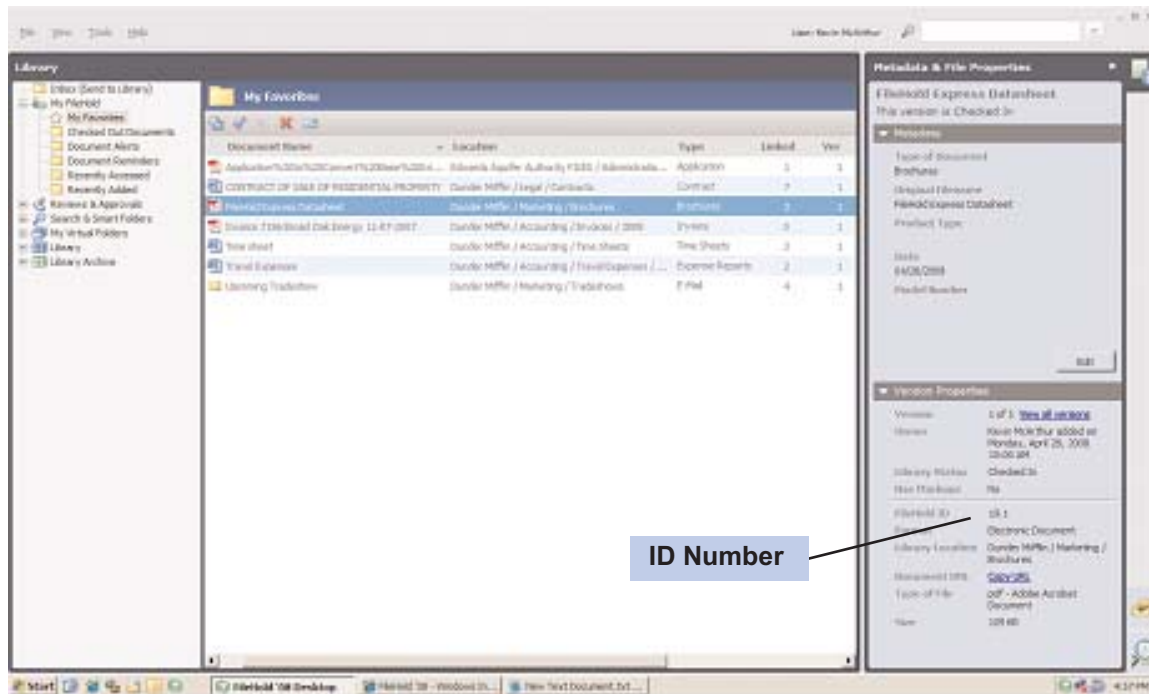
Bates numbering is very different from document numbering or versioning in that it provides a unique identification of every page of a document including pictures or images. This identification is most often used when documents are being handed from one agency to another and provides a way to check that 100% of the documents have been transferred. The unique numbering scheme is sometimes accompanied by further document identification text. Attorneys are the primary users of bates-stamp utilities.

In FileHold the bates numbering capability comes as a part of the Brava viewers that have been tightly integrated into FileHold. A bates number can be represented both as a prefix (document identification) and the page number with leading zeros that automatically increments with every page. An example of a bates ID, with text preceding the tag could be, **Smith vs. Jones 00001**. This would be being printed on the first page; Smith vs. Jones000002 printed on the second page, etc.

FileHold ID - Unique System Generated Number for every document

FileHold automatically assigns a unique number to every single document that is added to FileHold. This number is called the FileHold ID Number. It cannot be edited by users and is never duplicated in the system. This document numbering cannot be turned off. This unique document number is a simple sequential number that starts at number 1 and grows sequential with every new document added to FileHold. In the case of a different version of the same document the number is incremented by a decimal number to indicate a new version. For example a new document added to FileHold may get number 403. If that document is checked out and changed and then checked back in it would get the unique number 403.1. If it was checked out and changed again it would be numbered 403.2 and on and on.

The following screen illustrates the FileHold ID number that will always be displayed in the Metadata and file properties.



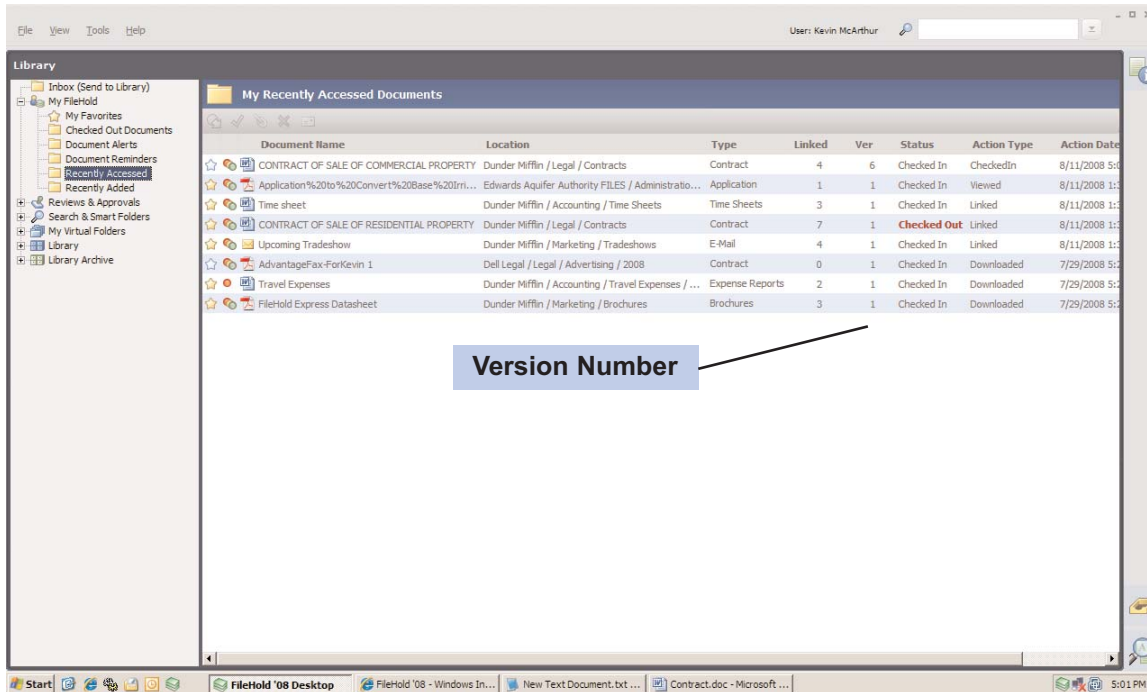
By using the optional Brava viewer that provides print and annotation features this number can be added to the document electronically and even printed on the document (the location for the printing can be selected using the Brava water mark and annotation features).

FileHold System Generated Version Control Number

Version control is one of the most critical elements of a document management system because it ensures users always have access to the most current version of a company document. This feature alone can cost justify the implementation of a document management system as it eliminates duplication of work and allows users to share the most current information on matters such as company policies or contracts.

Every time a document is checked out from FileHold using a standard web browser, from within Microsoft Office applications or using the FileHold desktop application it becomes a candidate for automatic version control. Version control allows managers to track the history of a document as it evolves, it records the date when the version was changed and by whom. The actual version numbering system starts at version #1 and is incremented by 1 number each time the document is changed and is checked back in.

The following screen shows a typical list of documents in the “recently accessed” folder with a corresponding version number.



Document Name	Location	Type	Linked	Ver	Status	Action Type	Action Date
CONTRACT OF SALE OF COMMERCIAL PROPERTY	Dunder Mifflin / Legal / Contracts	Contract	4	6	Checked In	CheckedIn	8/11/2008 5:0
Application%20to%20Convert%20Base%20In...	Edwards Aquifer Authority FILES / Administratio...	Application	1	1	Checked In	Viewed	8/11/2008 1:3
Time sheet	Dunder Mifflin / Accounting / Time Sheets	Time Sheets	3	1	Checked In	Linked	8/11/2008 1:3
CONTRACT OF SALE OF RESIDENTIAL PROPERTY	Dunder Mifflin / Legal / Contracts	Contract	7	1	Checked Out	Linked	8/11/2008 1:3
Upcoming Tradeshow	Dunder Mifflin / Marketing / Tradeshows	E-Mail	4	1	Checked In	Linked	8/11/2008 1:3
AdvantageFax-ForKevin 1	Dell Legal / Legal / Advertising / 2008	Contract	0	1	Checked In	Downloaded	7/29/2008 5:2
Travel Expenses	Dunder Mifflin / Accounting / Travel Expenses / ...	Expense Reports	2	1	Checked In	Downloaded	7/29/2008 5:2
FileHold Express Datasheet	Dunder Mifflin / Marketing / Brochures	Brochures	3	1	Checked In	Downloaded	7/29/2008 5:2

FileHold version control prevents documents from being overwritten or deleted as documents are updated by more than one party. All versions of the file are maintained by the system in the event that a rollback is required

FileHold Document Control Numbering

Some customers (especially engineering companies) work with large and complex documents that are tightly controlled. These customers like to assign a specific number to a document and use it throughout its lifecycle – this is what FileHold calls a document control number.

Document control number fields are created and modified in the Library Administration section of FileHold therefore the creators must have at least Library Administration rights. Once a document control number schema is created users can create new document and a new and unique document control number will be automatically allocated. Once a document number field is assigned to a schema and documents are created using this schema parameters cannot be modified.

There are two ways to generate document control numbers:

1. They can be auto-generated by the FileHold System
2. or entered manually by the user (perhaps after being generated by an outside numbering system).

In either case FileHold will ensure that the control number is unique to the document. When used, document control numbers are mandatory; they must be assigned to a document when it's added. They cannot be modified later.

If the document control field is auto-generated, the value is not displayed when adding the document. To avoid the possibility that two users might be creating a new document control number at the same time the number is only created and viewed after the document has been added to the library.

Each document control field has a prefix which must be different from all other prefixes. This ensures that each document control number is unique across the entire library. Auto-generated document control numbers use consecutive numeric values starting from a given initial value and a given number of digits. Manually edited numbers can be any alphanumeric strings with a given maximum length.

Once a document control has been added, FileHold will check through the entire library to ensure this number is not duplicated on any other document.

This document control number can be added to the document and optionally printed using the Brava mark up and annotation features.

The screenshot shows a window titled "Metadata & File Properties" for a document named "GABM Invoice Tracking Report". The document is marked as "Checked In". The window is divided into two main sections: "Metadata" and "Version Properties".

Metadata:

- Type of Document: Requisitions
- Original Filename: GABM Invoice Tracking Report
- Comments: Tracking report for a specific country.
- Countries: Canada

Version Properties:

Version	1 of 1 View all versions
Owner	Siopongco, Joey added on Friday, August 29, 2008 9:45 AM
Library Status	Checked In
Has Markups	No
FileHold ID	10.1
Custom Doc. No.	ENGG1890
Custom Ver. No.	PR#757
Format	Electronic Document
Library Location	Engineering / Purchasing / Requisitions
Document URL	Copy URL
Type of File	xls - Microsoft Excel Worksheet
Size	27 KB

An "Edit" button is visible at the bottom right of the window.

FileHold *Manual Version Control Numbers*

In addition to the FileHold automatic version control FileHold has a feature to allow users to manually generate and control more sophisticated version schemes that reflect the real world of major and minor releases in document versioning. An example of a more complex version control number would be 6.02.001

The version control capability is turned on by the Library Administrator when creating schemas for documents that might require manual versioning.

Versions control numbers are not mandatory. They can be assigned when adding a document or checking in a document and can be modified, separately for each document version, at any time. By default the version number is carried over from the last version when document is checked in. Version numbers don't have to be unique. A version control field can have an optional prefix, but it doesn't have to be unique.

Version control numbers can be printed on documents using the optional Brava viewer capabilities.