



FileHold

3rd Party Software Integration

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Introduction

FileHold believes that good software has open standards and can easily integrate or share data with other applications. FileHold was designed from the ground up with both simple and sophisticated ways to communicate with other software applications. The purpose of this paper is to describe the two most common processes customers use to make FileHold a part of an enterprise computing environment.

FileHold WebServices API - integration with 3rd Party Applications

FileHold document and record lifecycle software is based on the Microsoft .NET 3.0 framework Service Oriented Architecture (SOA) model. Microsoft provides an ideal technology platform to implement web services and to deliver modern Service Oriented Architecture. This architecture provides tremendous benefits to our customers, our partners and to FileHold's product development and professional services teams in terms of product scalability, flexibility and performance.

The main subsystems of FileHold communicate with each other via secure and fully authenticated web service calls. All FileHold application clients (including the FileHold Web Client, FileHold Desktop Application and FileHold MS Office Add-in) interact with the FileHold Server using the same web services and calls. These very same Web Services make up the FileHold Web Services API for integration of custom clients with the FileHold library. The web Service API allows: the integration of FileHold document management software functionality into other productivity applications. The API can be used to develop connectors to import documents and meta-data into FileHold from other applications or give users the ability to retrieve data and documents from the FileHold Library through a custom Intranet portal.

The SOA architecture provides the ability to deploy web services on different servers for the ultimate in system scalability and performance management.

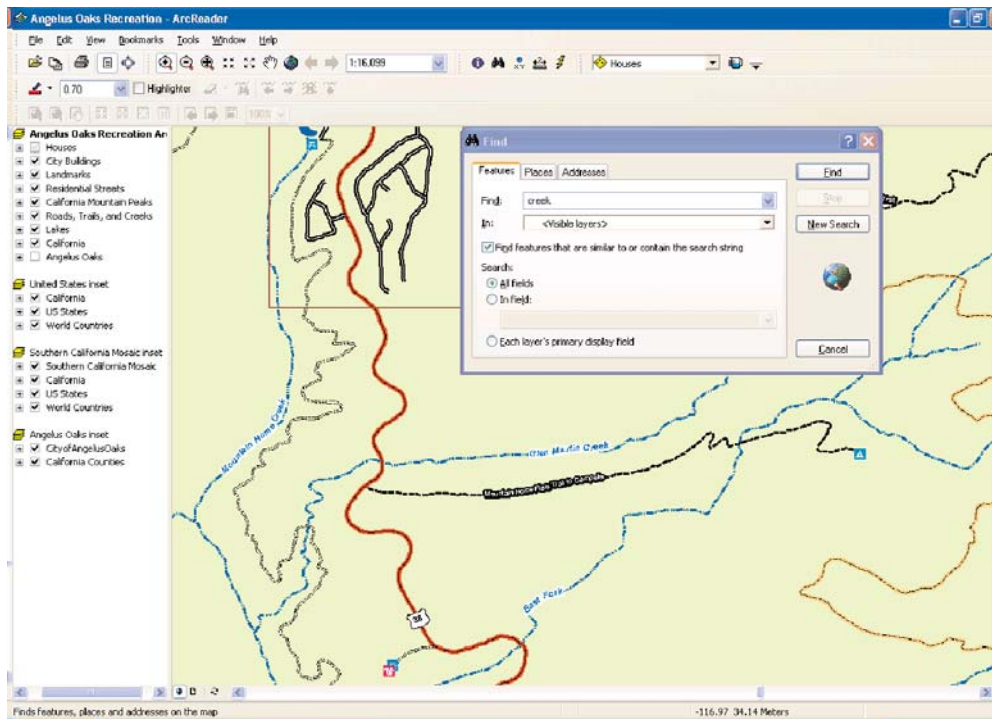
FileHold FastFind – 3rd Party integration Tool

FileHold document management software has an optional feature to allow fast and easy integration with 3rd party windows applications. The FileHold "FastFind" feature allows users to establish "hot key" links from 3rd party applications to FileHold. FastFind makes it inexpensive and easy for customers to link their windows (window forms) based business application with FileHold.

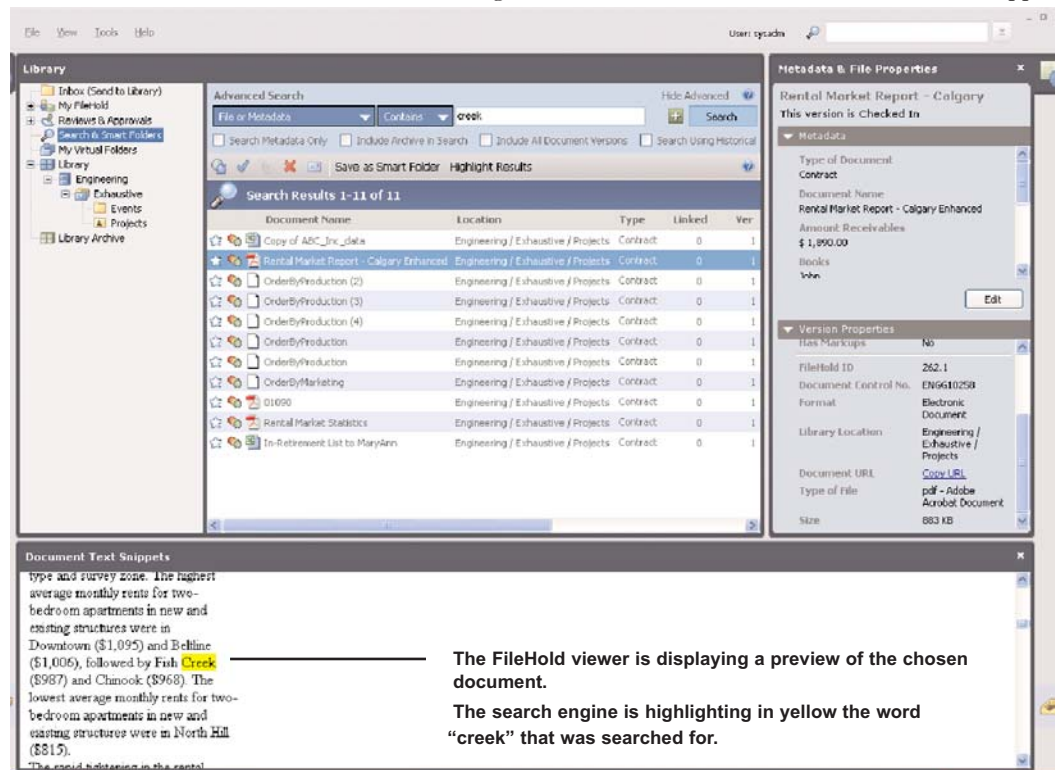
Example #1: A user, who has had the FileHold FastFind feature installed, is working in a windows based accounting application such as simply accounting or QuickBooks and is displaying a customer invoice. The user would like to see the original contract, or other documentation, that is associated with that customers invoice. These documents may have been scanned or imaged and stored in the FileHold software. To see the invoice the user simply puts their cursor on the Customer Name field (or just makes it the active field) and presses a designated "hot key" (i.e. F3). Upon pressing the hot key the customer name is transferred to the FileHold library search engine and all documents that have that customer name associated with them will be brought up in FileHold for review. The user can select the appropriate document and review it using the FileHold document viewer. To work with the document even further, the user can, open it in its native application for further work, or using "paperless office" best practices initiate a workflow and send that document to a colleague for approval.

Example #2: A customer is using a very popular Geographic Information System (GIS) such as ArcGIS. In this example the customer is looking at a creek on a map and wants to review all documents anyone has stored in either the GIS system or in the FileHold document management software relative to creeks.

The following screenshots shows that the user has typed “creek” into the GIS search engine but instead of hitting the enter key and searching for creek within the GIS they simply press the F3 key and a search begins in the FileHold document repository.



In the following screenshot we see the results of the search. The user has been given a list of all documents in the FileHold document library that contain the word “creek”. From this screen the user can simply double click on the document and open it to work on it. The user could also send this document to a colleague or initiate a workflow to several reviewers / approvers.



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