

## **FREQUENTLY ASKED QUESTIONS (“FAQ’s”)**

### **Q: What does FileNexus do?**

A: FileNexus indexes, collates and archives all records and files, of any type and from any source, into a single electronic data repository. Any record or records can be recalled and handled virtually instantly by any Windows PC connected over any TCP-IP compatible connection, including WAN, LAN and/or the Internet.

### **Q: How does FileNexus impact my business from a staff resource perspective?**

A: Conservatively, FileNexus will likely be five to ten times more efficient than your present system. Since FileNexus archives the majority of files automatically and all records can be recalled, researched and forwarded directly from the desktop, via e-mail, fax, printing, drag and drop, or workflow document links, staff time filing, collating and retrieving documents is dramatically reduced, even after accounting for time to run FileNexus. FileNexus requires very little administration time, about one hour a week by IT staff, and is highly efficient, even in “worst case” manual scanning, indexing or archival scenarios.

### **Q: How does FileNexus affect my business from a hard cost perspective?**

A: Since FileNexus stores records, such as paper and microfilm, electronically, your production and storage costs are virtually eliminated. In fact, a typical total system payback using these costs alone is generally less than 8 months! Of course, many users have experienced much faster paybacks; for example, one user paid for the entire system just from not having to spend the budget to increase shelving. Others have experienced a much more rapid return on investment by either eliminating legacy systems or reducing concurrent user fees on current host applications. Synergies using FileNexus can be profound, depending on your current situation.

**Q: Give me an example of additional potential synergies. For example, how would FileNexus save money on legacy systems and current host applications?**

A: Legacy systems no longer produce records, but still must be maintained to allow easy data access by staff. Printing all the data from a legacy system to paper and retrieving it on a day-to-day basis would be prohibitively expensive in staff costs alone. With FileNexus, you would simply set up each type of report that is stored on the legacy system, which is a one-time, five-minute task, and “print” it to FileNexus. Legacy system tapes may also be loaded in this manner. When users want to view legacy data, they simply log onto the FileNexus screen and “presto”, the legacy system, along with expensive maintenance fees, is gone! This alone, resulted in a 90-day payback at one site.

Current host applications can be extremely expensive to maintain, with an annual fee often being charged for each and every user seat. Moreover, since the system will get slower and slower as data accumulates, reports must be printed off the system onto paper, tape or microfilm, often within 60 to 90 days, in order to maintain system speed. Again, as with legacy systems, record retrieval becomes prohibitive from a staff perspective, let alone the cost of the media itself and associated storage costs. This is where FileNexus comes in. Of the user seats billed with a host application, some are for data entry, necessary to generate reports, and others, usually the majority, are for data recall. With FileNexus, it is a simple, one-time, five-minute exercise to set up each type of host system report.

By “printing” reports off the host system directly to FileNexus as soon as they are complete, host reports can be accessed through FileNexus. Those host user seats attributable to data view-only functions can then be eliminated. Moreover, host systems generally show only host data, not other ancillary information that might be involved with managing a file. In the FileNexus screen, the user sees all the relevant information in the same screen. A very basic example of this might be making a simple account receivable call, where the user might want to see the original P.O., which is a scanned image, old financial data from a legacy system, the relevant invoices from the new host system and the actual signed delivery slip, which is also a scanned image.

**Q: Is FileNexus expensive?**

A: No, it is not. FileNexus is a modular, expandable system, completely affordable for relatively minor departmental applications and yet expandable to full enterprise-wide capability.

You buy what you need, when you need it and receive full credit for your prior purchases every time you upgrade. In fact, if you're like most potential users, chances are that we can directly finance your software purchase, at 0% interest, for a fraction of your resulting hard operating savings! With no up front software costs and financing tied to savings, what could be easier?

**Q: I've had bad experiences with other software applications before, where costs and timelines were not what I was led to believe. How do I know this won't happen with FileNexus?**

A: We charge a fixed price to install FileNexus not a variable cost of time and materials, and we integrate it with your hardware and train your key resource people. We fix all further software procurement costs for a minimum of two years after your install date; there are no nasty upgrade surprises after you are fully committed. We also have fixed-maintenance support contracts up to three years in length, so no surprises there either. We guarantee that all data stored to FileNexus is exportable in its native file format, so you can be certain that we are not your next legacy system. If you are not convinced, take advantage of our Pilot Offer. If you are located inside the GTA, we'll supply you with a FileNexus systems engineer for two days on-site and prove to you that our system is fully capable of handling your needs! Outside the GTA, we charge for transit costs only. If you're not 100% satisfied, you'll have no further obligation to us whatsoever.

**Q: What does support include?**

A: Unlimited phone support to internal resource staff, all fixes, all maintenance releases and all version upgrades for the FileNexus modules purchased, which is literally everything you need. No surprises!

**Q: What does installation include?**

A: FileNexus software installation, installation of all third party ancillary software, such as Microsoft\*, SQL Server\* and NT\*, and integration with relevant hardware. Testing and setup of sample record types and full training with one or two key internal resource staff, which is everything you need to get up and running!

**Q: How long does system installation take?**

A: Full installation is extremely fast, on average, about three days from start to finish!

**Q: Can I supply my own hardware?**

A: Absolutely. A FileNexus system engineer will work with your IT staff to determine specifications for the intended purpose. In fact, many clients already have the necessary hardware and third party software in house. If not, purchase your preferred brand of hardware from your FileNexus Dealer or your preferred hardware vendor, it's entirely up to you. We're happy to integrate FileNexus, at a pre-agreed fixed cost, either way!

**Q: If I supply my own hardware, whom do I call for support?**

A: You always call us first. If there is a software issue, we'll address it. If the problem turns out to be hardware related, we'll make suggestions as to what the problem might be and help you get on the right track.

**Q: When I call other vendors for support, I often get put on hold for ages. If and when I do get someone on the phone, they take forever to deal with my problem. What about with FileNexus?**

A: When you call for support, you are nearly always calling Loris Technologies Inc. directly. That means that between 9.00 AM and 5.00 PM EST, you will be talking on-line with a FileNexus systems engineer or programmer, an actual person who can help you, in less than 60 seconds, an average of 95% of the time. Outside those hours, you can leave a message on the technical support line. Then you will be talking to a systems engineer or programmer within 15 minutes of your call, an average of 95% of the

time. Moreover, in the extremely unlikely event your call relates to a specific software fix, as opposed to simple advice, you will have your fix within one business day, an average of 95% of the time.

In the extraordinarily unlikely event that your problem involves a mission critical function, a programmer will be tasked immediately to the issue, no excuses, no delays. This situation has never yet happened!

**Q: If a new application is difficult to learn or operate on an ongoing basis, my staff just won't use it. How easy is FileNexus to use?**

A: The vast majority of staff uses FileNexus to retrieve information. If they are familiar with Windows\*, they'll learn everything they need to know in about ten minutes. For a system administrator, generally an IT resource person, training will take place over the first two days of the installation; it's also easy to learn, there's just far more content to review than for a user.

**Q: What type of information does FileNexus store?**

A: Data from mainframe computers running virtually any application archived as text, PC-generated data such as word processing applications, spreadsheets, inbound paper files such as purchase orders and correspondence, internally generated records with a signature component such as waybills, engineering files, sound recordings, live motion video and so on. Literally any and every file type needed for virtually any business application!

**Q: How are mainframe text reports set up in FileNexus?**

A: Simply import one sample of the report type you intend to archive into FileNexus. Highlight the unique identifier for that report type, that is to say the header or other unique elements that differentiate that particular report type from others. Then show FileNexus the index values, any combination of positional or keyword related bytes, up to 8,000, that you would like it to store for that particular report type, set security rights (see: "Security" below) and you're done. The whole process involves a one-time effort of about five minutes.

**Q: How are mainframe text reports exported to FileNexus?**

A: Simply set your host application to “print” reports to a designated spool directory on the network. FileNexus automatically samples this directory every few seconds, identifies the report types on hand, and indexes and archives them according to your unique preset instructions. If you do not have access to the network, you may export data via a standard serial printer cable. In either event, should you mistakenly export reports to FileNexus that you have not previously set up, it will capture the data and place it in an “unknown” directory pending further disposition by you. You will not lose the data.

**Q: How do I know FileNexus has received everything I’ve sent?**

A: A FileNexus log file tracks all inbound data by record type. Simply access the log file to confirm data receipt prior to deleting it.

**Q: How do I import scanned images into FileNexus?**

A: Using one or more scanners linked to the FileNexus Server via any TCP/IP compatible connection, such as a LAN, WAN or the Internet. Records scanned in this way can be indexed “on the fly” or indexed later by employing a batch scan function.

**Q: How are scanned images indexed?**

A: A scanned image, because it is the facsimile of a photograph, is not machine-readable and thus does not immediately lend itself to automatic indexing and archiving, as with text data above or PC data below. However, depending on the type of record and the inherent physical attributes that it possesses, FileNexus incorporates a number of extremely advanced tools to minimize the task. Use of these tools will depend on the quality and consistency of the record type to be scanned and may be summarized as follows:

- For records that have consistent layout, such as a signed waybill that you generated, simply show FileNexus the consistent zones that require indexing. The optical character recognition (OCR) option will automatically read those zones and convert them into machine-readable indexes.

- For any record with one or more bar codes. The FileNexus bar code option will automatically read virtually any bar code and enter it as an index value; or
- For records with inconsistent layout or quality, such as mixed inbound records like P.O.s, use the standard manual entry feature, bring the document up to the right side of the screen and key in the corresponding indexes in the fields provided on the left side of the screen. Hitting the return key after index entry automatically advances you to the next index value or, where all indexes for the record are complete, to the next record.

**Q: I have a lot of different record types that I want to scan. Some are of poor quality and many have different indexing parameters. Do I have to remember all the settings?**

A: As with all records archived to FileNexus, indexing parameters for each document type can be preset for that specific document. Moreover, an extremely sophisticated set of image enhancement tools can also be preset by document type. You need only advise FileNexus of which document type you are about to scan and all unique index and image enhancement tools for that record type are automatically employed. This is done automatically in text and PC generated documents.

**Q: I have a lot of documents that have multiple pages of different colours. Most scanning applications that I've seen in the past required me to stop between pages to reset the settings. Is this necessary with FileNexus?**

A: No. FileNexus incorporates technology that, in conjunction with a VRS - capable scanner, automatically adjusts settings on a page by page basis, with no stopping, no disruptions, maximum image quality every time, all the while maintaining the scanner's rated speed!

**Q: Most of my scanned records are from outside sources and of inconsistent quality. I'm concerned about all the staff time that will be consumed by manually indexing them. How will this affect potential staff savings?**

A: Very little. While manual indexing is the least efficient method of indexing scanned documents, our easy to use entry screens still make the

process five to ten times more efficient than manually filing the record! Of course, once the record is archived to FileNexus, subsequent retrieval and handling times are spectacularly lower compared to the manually filed record. Naturally, if you are also using FileNexus to archive text and/or PC records, which require no manual handling to archive, the average overall system efficiency is greater still.

**Q: How are PC generated reports archived and indexed to FileNexus?**

A: Simply use the save function to save the record to your FileNexus archival directory. On seeing the record, FileNexus will present index values, which you have preset, for entry. Or you can save it automatically by the file name assigned. That's it!

**Q: I'm concerned about who looks at what. What is FileNexus security like?**

A: FileNexus has an advanced, but easy-to-use, security system, based on users and groups. Security can be set by job profile or by specific user authorization. You only see selections for records that you are authorized to access and, assuming you can access the record, there is a set of 14 further parameters of limitation that you may be restricted by. These include issues such as: Can you see all of it? Can you print it? Can you view note attachments? Moreover, FileNexus automatically logs users who have looked at a specific record. This is great for determining where it is in a business process cycle, where the holdups are, or even determining if the report is worth producing in the first place! Conversely, you can determine which files a specific user has looked at, and see if they are browsing non-essential information.

**Q: Depending upon their job, many of my employees need to do entirely different tasks, with completely different document types, at any given time of the day. Is there a way that FileNexus can automate some of these roles for the user?**

A: Yes. Each user can create relationships between records, specific to that task, using our filing cabinet function. In addition, they can trigger pre-stored common types of search requests that can be unique by user and task. For example, if it is my job to review new bills, but only those between \$500 and \$1,000, I can trigger a search on a filing cabinet that contains our

original purchase orders as well as the executed receiving slips from the warehouse and the vendor's invoices. By clicking the appropriate cabinet icon, FileNexus will present the common index types for each document type; I need only tell it what I'm looking for and it will retrieve the files. Of course, once I have the file on the screen, I might want to add a note with comments. FileNexus allows for notes on any page and in any location, including colour options and pointers if you wish. If there is a discrepancy, it goes to Bob, if it's O.K. to pay, I give it to Sylvia; in either event, I simply drag the file into their inbox. Later, Sylvia triggers a request to see all new records in her "O.K. to pay" inbox.

**Q: How is FileNexus different from my current workflow application?**

A: Generally speaking, workflow solutions focus primarily on document routing during the actual creation phase of a record. As such, they allow for document changes during the creation process. FileNexus is a repository for the archival of finished records and therefore does not allow you to amend records once they are stored. This is imperative, if you are to eliminate current archival methods and enjoy the savings generated.

**Q: How is FileNexus similar to workflow applications?**

A: In so many ways, that most users who implement FileNexus do not subsequently install workflow applications. FileNexus allows notes and markups to be added to records, the key difference being that they can always be "stripped" away to reveal the original document. It allows records to be forwarded from one user to another. It provides for multiple options for record forwarding depending upon task and need. In addition, it stores archived files in their native file format, ready to use and amend as needed, and tracks and archives each version as it proceeds from one user to another. For example, let's say an organization uses Excel\* to create forecasts, and normally four individuals will want to review and amend the document in sequence. Person A creates the original document in Excel\* and then saves it to Person B's relevant FileNexus inbox. Person B sees the file and retrieves a copy directly into their Excel\* application on their PC. From there, they can change it however they wish. When they're done, they archive it to Person C's relevant FileNexus inbox and so on. Quite simply, FileNexus archives and protects each version of the Excel\* spreadsheet that is saved and forwarded through it. Person A's original document is protected, as is Person B's amended version developed from the copy they retrieved from

their FileNexus inbox. FileNexus uses extremely little space to store the protected document versions (see data storage below). It allows for subsequent version “backtracking” and enables a manager, who can view document progress through log files, to ensure that progress from one individual to the next is timely.

**Q: Can FileNexus exchange information with my current workflow application?**

A: Absolutely. Documents can be easily archived to FileNexus by your workflow application, much in the same way that a PC document is archived. Documents in FileNexus can be forwarded to your workflow application using our FileNexus document link feature, “FDL”. A user in the workflow application would receive notification of a new document and, upon clicking on it a link would be immediately established to the document in FileNexus. The link could then be forwarded to other users in the workflow application, or an actual document copy could be retrieved for subsequent modification within the workflow application.

**Q: Can FileNexus store form artwork and automatically superimpose it?**

A: Yes. Simply show FileNexus the form artwork, such as letterhead, blank invoice, P.O. or cheque, that belongs with a particular text data-stream. You only have to do this once. When you retrieve a document of this type, it will automatically superimpose the artwork over it. This means you can always reproduce the record exactly as it was originally. It also means dramatic savings in multi-part forms and stationery, since the copies that would have originally been maintained for your own internal use are now redundant.

**Q: Can I view multiple files on screen simultaneously?**

A: Yes. For example, if you were doing accounts receivable collection, you could view both the invoice, generated by your mainframe and with forms overlay, and the signed delivery slip, scanned-in by your shipping department, on-screen, side by side. If more files were required, such as the original client P.O., FileNexus can automatically tile your screen for you.

**Q: Can different people look at the same file at the same time?**

A: Yes, as many as are required.

**Q: Can FileNexus generate index related reports?**

A: Yes. Simply do your search, simple, wild card or Boolean, and the report can be generated almost instantly.

**Q: Can FileNexus reports be used in other applications?**

A: Yes. Report results can be sent to word processing programs for things such as mailers. For example, I might want to know the name and address of everyone who bought widget A and B, but not C, in the months of March and April in order to send them a mailer. A Boolean search would produce the result in FileNexus. The results could then be sent to a merge program in the word processing application. Similarly, results can be sent to a text file for pick-up in a spreadsheet, report program.

**Q: Can I use FileNexus to search on the contents of records rather than just indexes?**

A: Yes. A basic feature in the FileNexus Text Server License is the ability to search for words and numbers within one or more documents. Our 'Full Text' option allows for complex text and numeric queries across text, PC and image data, simultaneously, even giving a percentage "hit" rate.

**Q: What if I want to change or add index values later?**

A: Simply add a new document type in FileNexus. All new documents archived after that point will contain the new information. Old and new documents can be automatically related by cross-folder search. Alternatively, documents that are already archived can be exported and re-imported using the new set-up parameters.

**Q: Can FileNexus collate different record types for printing and export functions?**

A: Yes. Simply trigger a cross-folder search, directly from your filing cabinet if you have pre-stored it. FileNexus will automatically stage related

documents, even from different data sources, into a user-defined sequence: for example, sequence this record type first and that related record type second. Then, by selecting some or all of the documents in the result list, they will print or export in that sequence. For example, a courier company bills clients with an invoice produced off the mainframe and attaches copies of related waybills, which is normally a substantial undertaking!. Instead, invoices are “printed” to FileNexus electronically and waybills are scanned in from the shipping department. I trigger a cross-folder search in FileNexus and, according to my pre-specified instructions, it stages each invoice first and the related waybills immediately after. The first 5 invoices are to clients who I bill by e-mail, which I do directly off the desk top, the next 10 who I bill by mail, which I print for mailing, the next 2 by fax, which I do directly off the desk-top, and so on. In any event, the records were collated for me automatically and would have been produced and delivered in the sequence I desired: invoice/related waybill/related waybill, next invoice/related waybill/related waybill and so on.

**Q: How fast is FileNexus in locating records?**

A: Extremely fast. While FileNexus is to a small extent hardware-dependent, a typical time to locate a single record among a group of 1,000,000 records, would be less than a second. This is equivalent to searching through every document in over 3,500 four-drawer filing cabinets in one second! Imagine how your staff’s productivity will increase. If all you’re looking for is an index value, you’re done. If you want to view the document, that will be dependent on the size of the file, which is sent by the server across the network in compressed form, and the speed of the network itself.

**Q: How much information can FileNexus store?**

A: There is no limit; it’s simply a hardware issue. FileNexus is so effective in compressing data, it stores 1,000,000 pages of typical text data per 1 Gb. of storage, so storage device expenses are usually minimal. FileNexus will manage multiple storage units of any combination of RAID, hard drives, CD, DVD, Optical Disk or Tape. It can also automatically route specific document types to specific media. Moreover, FileNexus will track data on off-loaded cartridges and instruct you to mount them, in the event that a particular query calls for information that they hold.

**Q: How does FileNexus aid me in disaster recovery?**

A: The hardware component of the server is configured with at least two mirrored hard drives; if one goes down, the system is still fully functional. These, in turn, are backed up on tape, either internal or network tape drive, so, if both hard drives go down, they can be rapidly rebuilt. Data partitions are configured on the hard drives to amass data prior to archival to the storage units, the size of the partitions being determined by the size of the media cartridges to which data will be ultimately archived. Once a data partition is full, it is copied to the storage unit. Concurrently, it is copied to an optical media burner for production of a disk for your fire-safe. This disk contains a copy of all the data and principal indexes necessary for rapid resumption of operations in the event of a catastrophe such as fire.

**Q: Can FileNexus be customized for my specific needs?**

A: FileNexus is so open and flexible that most users require no customization whatsoever. However, if you require custom work, we'll seriously consider it!

**Q: I'd like to develop my in-house application to communicate directly with FileNexus. Are there tools available to do that?**

A: Yes. FileNexus is available with a full compliment of ActiveX tools for rapid in-house development.

**Q: What kind of hardware and third party software do I require?**

A: You will need an Intel\* based Server running NT\* 4.0 or better and an SQL Server\* 7.0 or better. For scanning you will need a Kofax compatible scanner, the appropriate Kofax board/software and a desktop PC to act as the scan Server (see; Minimum Hardware Requirements for additional details). We're happy to assist you in making the right selection.

**Q: If I have a FileNexus Server at one location, but people at another location who want to export to, or retrieve data from that Server, do I have to buy a second Server license?**

A: No. If data is exported to the Server at the installation location, no additional Server license is required. Data retrieval clients can be anywhere, connected by a LAN, WAN or the Internet to that Server.

**Q: How does network licensing work?**

A: FileNexus networking is based upon concurrent users accessing the Server, regardless of location. This means clients accessing the Server can be anywhere and an unlimited number of users can have access; we only monitor how many people access the Server at the same time. Also, network upgrades are billed on a “retained equity” basis. If, for example, you ordered a 10 concurrent user license, you would pay the 10-user price. There are no incremental charges based on the 2 or 5 user levels. Should you later upgrade, for example to a 20 user license, you would only pay the net difference between the original purchase, 10 user, and the upgrade purchase, 20 user. Network pricing is a **one-time fee**, not a recurring annual charge, and is consistent, regardless of the Server licenses held.

**Q: How does Server pricing Work?**

A: There are four Server options:

- 1) SCM Text Server – for all mainframe text data;
- 2) SCM P.C. Server – for all P.C. generated data;
- 3) SCM Text/P.C. Server – for all text/P.C. data; and
- 4) SIM Image Server – for all scanned images (includes first scan station license).

Each Server license allows for the capture of unlimited data, is fully featured with relatively few options and includes a single concurrent user license.

**Q: Who is Loris Technologies Inc.?**

A: Incorporated in 1980, Loris Technologies Inc. is a leading innovator in the programming, development and on-site application of digital storage

technologies throughout North America. Working in close concert with our user base, we utilize proven industry standard sub-elements from such market leaders as Microsoft, to ensure “real world solutions that work”. Our innovative technologies, superior cost effectiveness and superb client support have earned us the business of a broad range of industry-leading organizations of varying sizes and fields, including Ford, Teknion, Axidata, Danone, Indal, ICI, Magna and RT Capital, to name a few.

**Q: How do I find out more about FileNexus?**

A: Visit us on the web at [www.loristech.com](http://www.loristech.com), where you'll find technical data, performance highlights, success stories and much more!

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