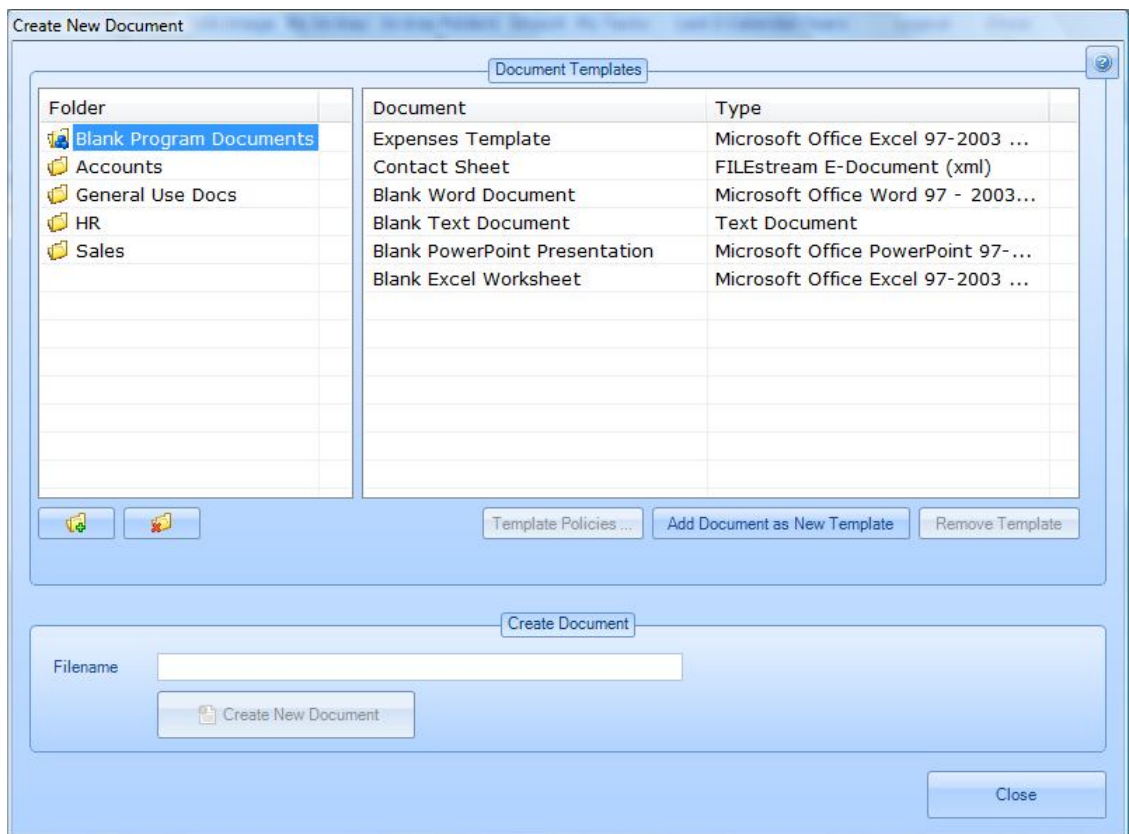


Store, access and modify your Company's frequently used standard documents within File Stream

More and more of our customers are using File Stream not just for storing scanned paper documents but as a full document archive for all incoming and outgoing correspondence. Most companies have documents that they use repeatedly by simply changing some key information fields, leaving the main body of text largely unaltered.

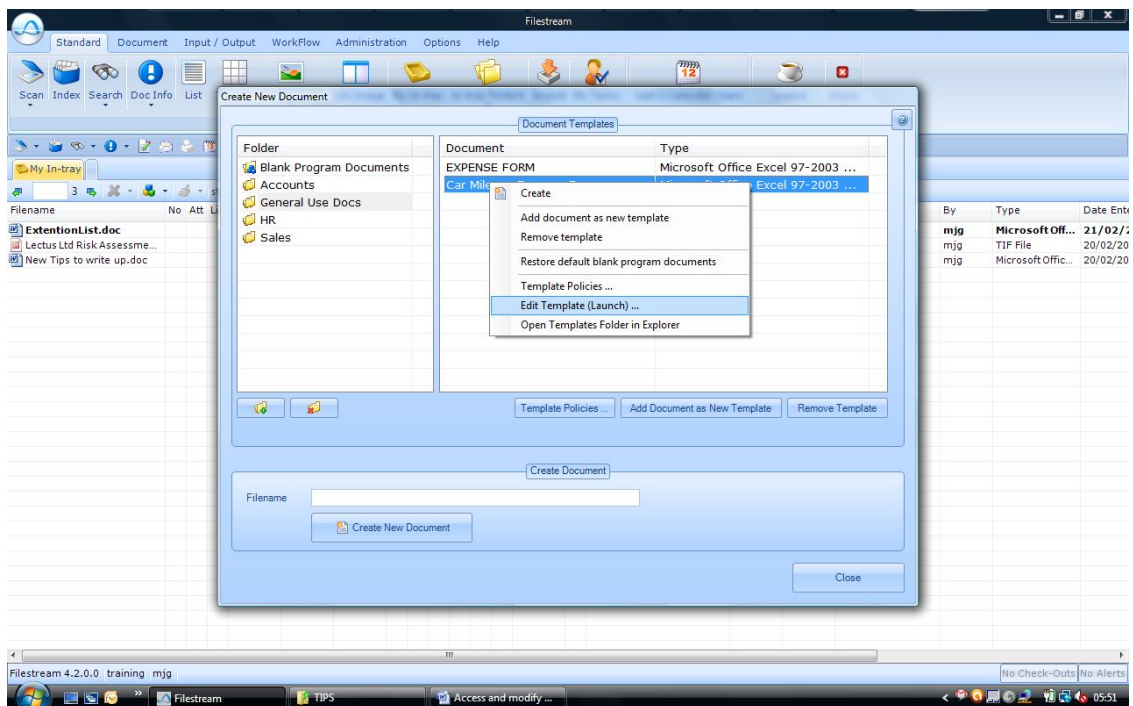
It is very simple to add these documents to File Stream. The process is as follows:

- From an In-tray, select the 'Create New Document' option from the 'Right Click' dropdown menu. A new window opens

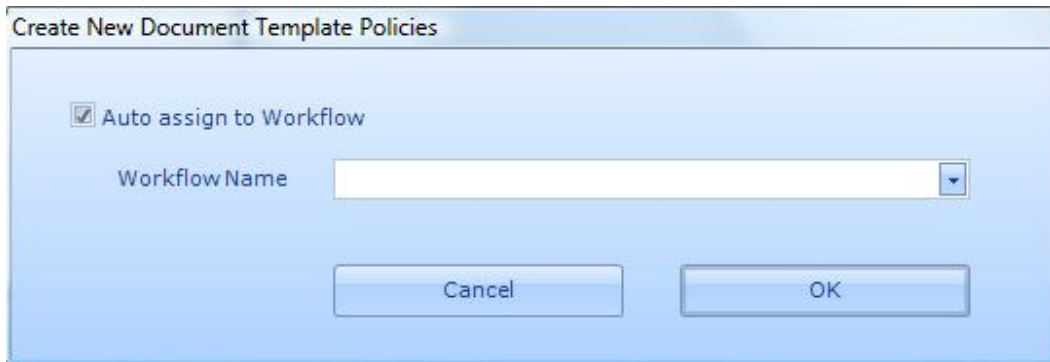


- You will see that the system already has a folder containing Blank Program documents such as blank word and excel documents

- If required, you can create folders for each department so they can store only those documents relevant to them
- To add standard documents already outside the system, simply highlight the relevant folder and then browse to the document by selecting the 'Add Document as New Template' button. The document will now appear in FS and be available for use when you use the 'Create New Document' option
- You can remove the template by highlighting it and selecting the 'Remove Template' button
- It is also possible to edit template documents from within the system. Highlight the relevant document and access the 'Right Click' menu. Select the 'Edit Template (launch)' option. The document will now open in its own program ready for changes to be made. Save and close and the updated document will be available in FS.



- For File Stream customers using our workflow module it is also possible to automatically assign a document when it is created into a specified workflow. To do this highlight the relevant document press the 'Template Policies' button. This opens a new window allowing you to select which workflow you want the document to be assigned to.



The image shows a dialog box titled "Create New Document Template Policies". It has a light blue background and a thin border. At the top left, there is a checked checkbox labeled "Auto assign to Workflow". Below this, the text "Workflow Name" is followed by a white text input field with a small blue dropdown arrow on the right side. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "OK" on the right, both with a light blue gradient and a thin border.