

# Transform® Filer: Frequently Asked Questions

## What versions of SharePoint® do you support?

- We support both versions of SharePoint 2007: MOSS (Office Server) and WSS 3.0
- We support both versions of SharePoint 2010: Server and Foundation

## Does Transform Filer scan documents?

Transform Filer does not actually scan documents. Instead you can use any copier or desktop scanner to scan the documents once they are barcoded. You can even use a fax machine. This is a common approach when using Transform Filer from locations that do not have network connections.

## How do I use my existing devices to get documents into SharePoint?

Transform Filer includes a feature that will monitor any directory. You simply add a copier job option to scan the documents to the folder and Transform Filer will read the scanned document and send it to SharePoint. If using a desktop scanner, you can simply scan to the network folder that has been set-up with Transform Filer.

## Do I have to utilize Bottomline services for every new document I want to store or can we configure ourselves?

No, training is offered to enable you to utilize the “drag and drop” template builder and set-up new document types or search keys.

## How do you link documents to business applications?

Transform Filer can read almost any business screen. Because of this feature, it can use data from the screen to instantly categorize your document. It does this by remembering the screen when you click the “file” key.

## How do you retrieve a document from a business application?

Since Transform Filer can read data from your business screen, it can use any of that information to retrieve a document you may have filed earlier. For example, if you had filed a document with account number 123 on Wednesday and scanned it Thursday, you would be able to retrieve it that same day just by clicking the “smart search” key. When you press the key, Transform Filer displays the documents that match the information on your screen, based on the template that was set-up for that screen.

## Within your existing customer base, what departments are utilizing this product?

There is really no department that would *not* benefit from Transform Filer. But some common examples include Accounts Payable, HR, Accounts Receivable and Legal.

## How long is the implementation?

Usually 3-5 days including installation, training and configuration of your first five file and search templates. This assumes you have SharePoint up and running and have the ability to support remote access for installation, configuration and training.

## How much does it cost?

Transform Filer is licensed by user. Each user requires a license and we offer flexible, tiered pricing to match your specific need. (If pressed to give a price range, typical cost is \$5k-\$15k.)

## Can you provide customer or other examples of a transactional document process that could be supported by Filer?

**Example 1:** An employee performance evaluation is signed and returned to human resources. The HR admin needs to record the document as being received. They access the employee record in their HR application. Then, after marking the performance evaluation as complete, they click a key to file the document.

**Example 2:** A contract is signed internally and then must be mailed for a wet-ink signature. Before mailing, the contract admin accesses their CMS, records the internal signature event, and clicks a button to file the contract. They then place a label on the contract and mail it. Transform Filer records an audit entry in SharePoint to remind the contract admin that a document has been sent and is awaiting return.

**Example 3:** Citizens come into the county office requesting to apply for a low-income energy assistance program. The clerk accesses their family record and accepts a signed request form. They can immediately file the document, place a barcode on it, and then quickly assist other citizens. The requests are scanned at a later time. If a citizen has requested services before, the clerk can press the smart search key to find the citizen's previous requests.

Other possibilities:

- Application receipting
- Bank account opening
- Inventory operations/Material receipt
- Hospitality operations

## Where do my documents "live"?

In a secure library within SharePoint.

## Do I have to barcode my documents?

Only if it is a paper record. If the document is already in electronic form, you simply need to upload it. Transform Filer supports upload to SharePoint directly from your desktop using the same one-click filing feature that is used for paper documents.

## Where can I purchase the barcodes?

Bottomline has a complete line of barcode labels available for purchase that have been optimized for use with Transform Filer. However the product supports industry standards that allow you to procure barcodes from numerous sources.

## How long do the documents stay archived? Can they be purged?

Documents may be archived as long as your business requires. Within SharePoint Server there are records management capabilities that can define retention and archiving through easy configuration set-up.



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