



## DATASHEET

Xythos Filer is client application for the Xythos Enterprise Document Management Suite that enables knowledge workers to easily upload scanned or electronic documents from their local system into Enterprise Document Manager along with any classification and metadata information or record properties. Designed specifically to simplify the classification and records declaration process, Xythos Filer is an easy-to-use solution for those that work from desktop environments and need to upload indexed content or records into Enterprise Document Manager.

“Our organization needed a safer and easier way to exchange operations documents between offices in 40 different countries. Xythos provides the control and flexibility a rapidly-growing business like ours requires.”

*Walter Klincewicz*  
Information Technology Manager  
DSV Air and Sea, Inc.

### *Benefits*

#### **Enhances productivity**

Designed to work with existing scanning and productivity applications, and support any business process, Xythos Filer saves the time required to learn new systems. Knowledge workers can now complete repetitive document declaration tasks without ever leaving the desktop. And because Xythos Filer integrates seamlessly with Enterprise Document Manager, connected teams can scan documents in one location and then classify and upload from another.

#### **Simplifies the indexing and records declaration process**

Employees can create classified content and declare records directly from the desktop – using desktop scanning software or directly from productivity applications. Introducing the concept of “drop boxes”, users simply add new content and documents that are scheduled to become records or must be indexed in a specific way. Xythos Filer allows users to immediately add document metadata properties or complete metadata assignment when documents are ready to be uploaded.

#### **Improves security and compliance**

Organizations can better address growing compliance requirements because document class and records data properties must be applied with Xythos Filer when the documents are scanned or created. As a result, organizations can be confident that they will be able to produce the correct documents and records on time for electronic discovery requests or other document collection requirements.



## Features

### Desktop scanning

Use Xythos Filer to upload and index scanned content into Enterprise Document Manager. Scan documents and content with standard desktop scanning software into the local drop box. Then enter appropriate index / metadata and documents or records are ready to upload. Multiple users and computers using standard scanning tools and Windows networking can participate in the process to better manage team resources.

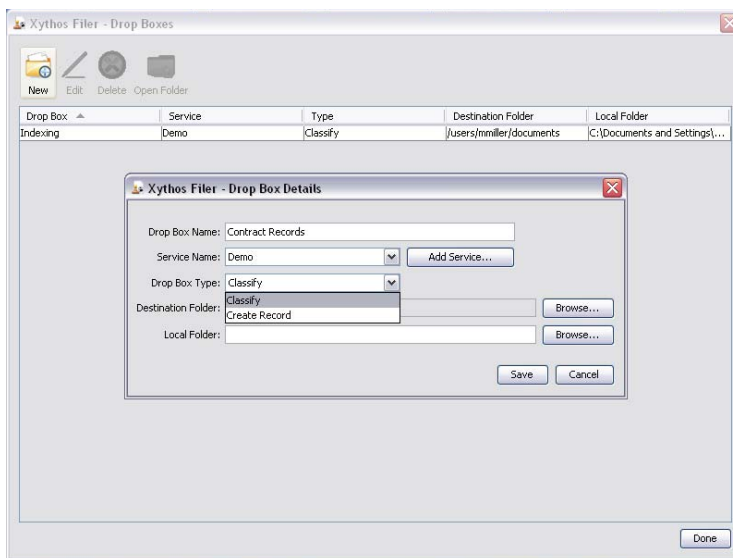
### MFD productivity

Xythos Filer is also easy to use from any networked MFD (Multi-Functional Device). Simply scan documents to a local or networked drive that is configured with Xythos Filer drop boxes. Assigned tasks will indicate when documents and content are ready to be indexed or declared a record. Since multiple users or computers can participate in the process, organizations can take advantage of distributed teams to complete a wide variety of business document processes.

### Create records directly from desktop productivity applications

Xythos Filer enables teams to create classified documents or electronic records from within the productivity applications they already use. Standard “save as” functionality enables employees to select the local drop box folder directly

from application file menus. When ready, they can add document classes or metadata, declare records, and upload completed documents into Enterprise Document Manager right from their desktop.



Use the drop box in Xythos Filer to create classified documents or records and prepare them for uploading.

Manager within an indexed folder or the Records Management module permitting response to multiple compliance requirements within a common content repository.

Placing documents and content into a Drop Box acknowledges that the file contents have achieved a specific stage (final, stage approved, etc.) and are ready for transfer to Enterprise Document Manager as a classified / indexed file or as a record. Xythos Filer can be customized to fit individual business processes by selecting time intervals for pending tasks and notification for successful or unsuccessful uploads. Multiple, simultaneous uploads can also be scheduled. Xythos Filer automatically checks for new content added to drop boxes and presents those new tasks to the user. When content is successfully uploaded, Xythos Filer removes files from the Drop Box.

## Using Xythos Filer

### Drop boxes

The “Drop Box” is a folder on the local system that temporarily stores files awaiting transfer to Enterprise Document Manager. It is used to create a classified document or record in and prepare it for uploading. Multiple drop boxes further aid in the indexing and records management process because they represent specific destinations in Enterprise Document



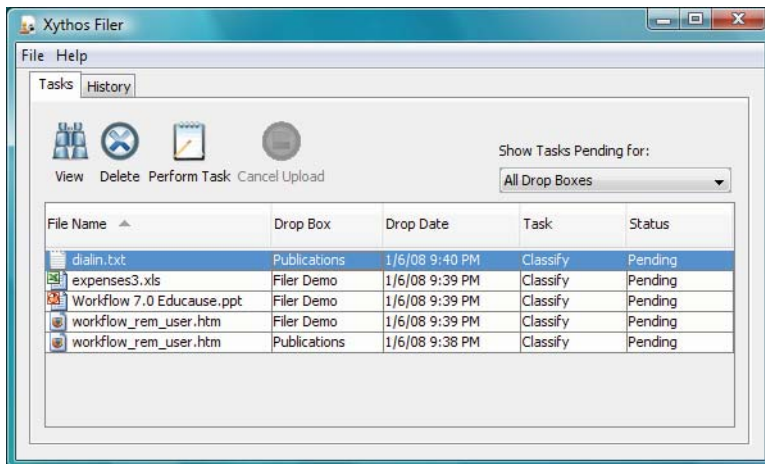
## Tasks

Work in Xythos Filer revolves around two tasks - Classify (index) which creates indexed metadata for documents or content, or Record which creates record metadata for documents or content. To aid productivity and help eliminate errors, the task type is determined by the drop box in which the document is located. As new files are added to drop boxes, a new task is created in the Tasks tab. Users may perform tasks on a single file, or multiple files that contain the same classification or record metadata.

When tasks are presented, the user enters metadata for indexed or record declaration activity. The document or content is then queued for upload into Enterprise Document Manager. Tasks are removed from the list after each successful upload and logged as history so that users always have a historical record of completed activities. The uploaded file is then removed from the local drop box to aid in meeting various security compliance requirements

## History

History provides a quick view of previous tasks and details. The History tab contains entries of activities that have been completed successfully, were cancelled, or generated an error. For example, if users are not currently online or are unable to connect to Enterprise Document Manager, the history will indicate a “Connection Failure.” This is particularly useful when completing simultaneous tasks to ensure documents and content have been properly uploaded to Enterprise Document Manager.



Enter metadata for classified or record declaration activity from the Tasks tab..

## Functionality

### Scanning documents and content

**Scanning from the desktop.** Using a desktop scanner and standard software, users scan documents into a Xythos Filer drop box. Because multiple files may be scanned, the user

can concentrate on other related tasks such as OCR, de-skewing, etc. When scanning is complete, document classes, metadata and record information can be added automatically or at a later time. Xythos Filer presents the user with task lists so that no document is missed.

**Scanning from a networked MFD.** Users can also scan from a networked MFD to their local Xythos Filer drop box. After documents and content are scanned, the user can then return to their local computer to select the document class and add metadata or record information before uploading to Enterprise Document Manager.

**Scanning from a networked MFD - multiple team members.** To take advantage of distributed teams, one team member can use Xythos Filer to scan documents while another team member adds indexed metadata and uploads to Enterprise Document Manager. This is particularly useful in organizations where documents originate in one department but are managed by another.

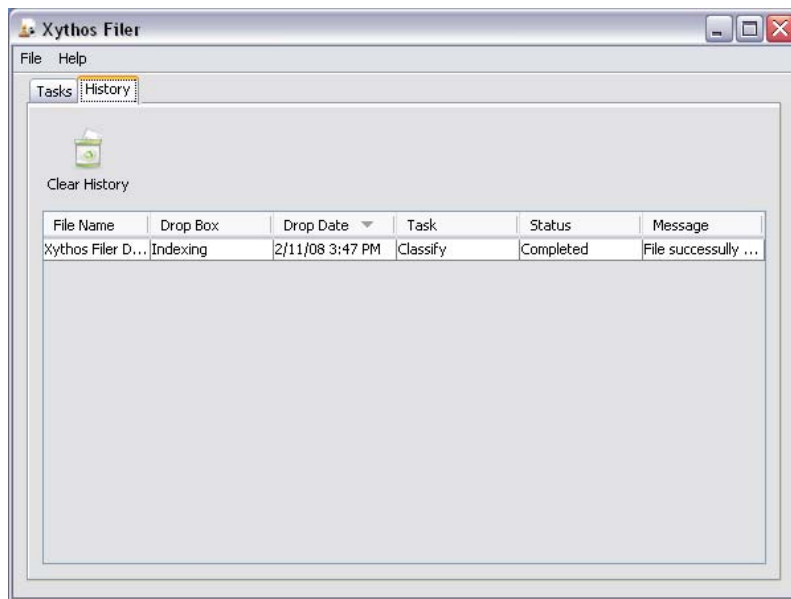


After the first team member scans documents and content to a networked drive, the second user can add document classes and metadata before uploading to Enterprise Document Manager.

## Records Management

**Creating a record from an existing document on a local drive.** Xythos Filer enables users to easily create records from existing documents. Users add the documents to be declared records to the appropriate Xythos Filer drop box named “Record Category” or “Record Folder” and enters the required metadata before uploading the completed record to Enterprise Document Manager.

**Creating a record from a new document.** Just like indexing documents, users can create a record directly from the productivity applications they already use. Standard “save as” functionality enables employees to select their drop box folder from their folder menu list. When ready, they can declare records and upload completed documents into Enterprise Document Manager from the desktop.



Previous tasks and details are viewed from the “History” tab.

**Creating a record from an email attachment.** Users can create a record from email messages containing attachments by simply opening the email message and choosing “Save As” and selecting their Drop Box directly. When ready, users can declare email records and upload completed documents into Enterprise Document Manager from the desktop.

## Classification / Metadata

**Classifying existing documents or content.** A user can add documents to be indexed to the appropriate Xythos Filer drop box and enter the required metadata before uploading the completed document to Enterprise Document Manager. If employees are not connected to the network or have several documents they wish to

classify at once, they can postpone adding metadata. In either case, the taskbar in Xythos Filer will periodically remind the user there are documents to be indexed.

**Classifying a new document.** Just like indexing documents, users can create classified documents and content directly from within the productivity applications they already use. Standard “save as” functionality enables employees to select their drop box folder directly. When ready, they can add the appropriate indexing metadata and upload completed documents into Enterprise Document Manager from the desktop.

**Save and classify email.** Simply open the email message, select “Save As” from the appropriate menu bar and save to the Xythos Filer drop box. When ready, users can add classification metadata and the upload the email into Enterprise Document Manager.



## *Xythos is the document management partner of choice*

If organizations need to:

- Simplify the indexing and records declaration process
- Provide secure online document collaboration
- Improve content security and compliance
- Enhance productivity
- Eliminate email file attachments

Consider Xythos.

Xythos Filer is part of the Xythos Enterprise Document Management Suite. Find out more about how Xythos' secure document management and collaboration solutions empower organizations to reduce costs, achieve complete accountability, and improve content collaboration initiatives. For more information, visit [www.xythos.com](http://www.xythos.com).



***For more information please call 1.888.4XYTHOS  
or visit [www.xythos.com](http://www.xythos.com)***

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