



iN-FILE Information Document





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Introduction and Company Information

Objectives of the document are:

To provide an overview of Instate Technology Ltd

To provide answers to typical questions asked by clients in tender situations

Contact Details

All Correspondence and requests for further information should be directed to:

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Company Information

About Instate Technology Ltd

In an increasingly pressured business environment, we offer our customers quality technology solutions across every phase of their development, from consultancy and network design, through to installation, training, support and maintenance.

We believe that our ability to reliably deliver total quality solutions within one strong successful organisation is a major benefit to customers.

Technology changes rapidly and we can be your fully accountable partner, providing you with clear understanding of the solutions available to meet current and future needs. We achieve and maintain high levels of customer satisfaction and value for money.

Instate was formed in 1986 and since then we have steadily grown to become a leading, provider of IT, Telephony and Software Solutions. In addition Instate provide and are the authors of a document image management system called iN-FILE.

Still privately owned, we offer a nation-wide service from our headquarters, located in Leeds, close to major rail, road and air connections.

Company Registration

Instate Technology Ltd is registered under the Companies Act (1985), Registration number 1971772, date of registration 1986

VAT Registration

Instate's VAT number is GB 430 9406 68

Bank Details

Barclays
93/95 Main Street
Garforth
Leeds
West Yorkshire
LS25 1AF

Account Number: 33423085
Sort Code: 20-33-42

Company Legal Status

Instate Technology Ltd is an UK Limited Company





iN-FILE Electronic Document Imaging

Designed with simplicity in mind, iN-FILE Document Management works alongside your existing business applications, replicating and enhancing your processes and procedures.

Rather than reinventing the wheel, our document management system adapts to how you work and want to work. There are no complex operations to master - adoption of iN-FILE is simple, straightforward and stress free...

iN-FILE can handle all manner of documents, so whether you're scanning in paper documents or importing existing digital files, such as emails or PDF's, you can route them safely between users, already processed and archived, using our easy, EDM (Electronic Document Management) application.

No more switching between different programs or between digital and manual files. With iN-FILE you get an all-encompassing document management system capable of handling all your document needs.

When using iN-FILE the speed of document retrieval is amazingly quick, and that's just one of the many benefits that you, as a typical client will experience.

iN-FILE provides auditing and security functions make it easier for you to adhere to ISO and legal compliance.

Filing

Documents that have been scanned or imported into In-Trays including emails can be filed away using the following functions:

New - whereby documents are filed to an appropriate database/ filing cabinet using Index references

Append - where a new document is appended to a document already in the database/filing cabinet. This can only be done with TIFF & PDF files. Appends can either be at the beginning or end of a document or to a specific page within the document.

OCR - Enables users to zone in on defined areas of a scanned image. Information from this zone is then used to automatically index and file away the document.

Barcode - Enables users to file direct from scanning using a barcode as an index reference. iN-FILE can even read barcodes on PDF documents which you can scan from a directory. Additional License Required

File as Index - This allows you to import all your documents including Word, Excel, PDF etc straight into an iN-FILE database using the file name as an index reference

Index fields - act as folder tabs (i.e. Company Name, Invoice No) for filing and retrieval purposes

Importing - Documents can also be imported into IN-FILE from other programs such as Word, Excel and PDF's, so that both scanned paper and electronic documents can be filed together





Outlook E-mail Facility - Enables e-mails to be copied automatically into appropriate in-trays or databases. These are filed away using the 'subject line' of the email as the reference.

Retrieving Documents

Documents filed in databases or cabinets can be retrieved by:

Typing in relevant data into Search Fields for example company name, invoice number.

Creation Date - The date recorded when the document was actually filed

Date Modified - The date recorded when the document was last modified










Search all databases

FTS – (full text search)

Document Modification

iN-FILE gives you the ability to modify scanned documents, you can rename, rotate, invert and annotate.

Annotation options include the ability to:

-  Draw Lines
-  Draw Freehand
-  Blank Out (hide certain areas of a document to hide confidential data)
-  Highlight Areas
-  Add Pictures/Images/Graphics
-  Add Text
-  Add Stamp (i.e. Date, Approval Stamps)
-  Add Post It Note (For a colleague to read)
-  Add a Signature (to sign off documents)

Viewing Modes

Viewing your documents is one of the most important functions you need to use and we've made the whole viewing process as easy as possible.

Normal View

Thumbnail View (multipage document)

Fit to Screen / Width and Height

Fit to Selection (Enables users to zoom in on an area on a document. For example the POD number) so they can view the same area on all subsequent documents

Magnified View (where areas of interest are viewed through a magnifying glass) useful when looking at images or drawings whatever the size.





Zoom In / Zoom Out Modes

Inverted View (useful for viewing scanned in microfiche documents)

Movement/Transfer of Documents

Documents can be:

Saved to portable In-Trays (removable media for use on another system)

Emailed - to anyone with an active email account

In-2mailed - passed between iN-FILE users (using iN-FILE's internal mailing system) either by:

- Broadcast - (where documents are made available to all recipients at the same time)
- Distribution - (where documents are routed through a number of users in a specific order for checking, commenting, signing off purposes)

Documents can be passed between different in-trays being either:

- Copy/ Duplicated (where copies are made of the original either in the same in-tray or a new one)
- Moved/ Delete on Transfer (whereby documents are move from one in-tray to another leaving no copy behind)

Documents can also be:

- Combined (with other files to form one single document)
- Separated (into separate pages so that each page (of a multi-document) can be filed individually)

CSV Files can also be used to populate iN-FILE's index fields with data extracted from other systems, for example Databases or Excel Spreadsheets.

Documents may also be imported into iN-FILE from other programs, computers and the internet.

Additional Features

Signature Stamp (allows users to stamp any document with their own signature)

Memo Field (Advanced Database, TEXT field will allow up to a maximum of 255 characters where a MEMO field has been set to a maximum of 10 Million character)

Batch Field Update (enables numerous documents with the same index information to be updated together)

PDF (files can be Exported as PDFs)

Scan To PDF (convert documents into PDF whilst scanning)





SQL Server (allows iN-FILE databases (where index and image-path information is stored) to be created and used on SQL servers giving a larger capacity for the iN-FILE databases)

File Encryption (Encrypts files held within an iN-FILE database and portable Databases - securing your files where ever you take them)

Barcode – Additional features:

- Copy to a folder – during the scanning process a copy can be sent to a specified folder
- Auto Database Separation: allows the use of a barcode to separate documents into different databases, you can also select which field to add the barcode information into for the purpose of indexing.
- Prefix Character recognition: the barcode reader will only recognize barcodes with a specific prefix

Scan from a Directory

Customise your start up Logo

Instant Messenger (sends instant messages to other iN-FILE users who're logged in)

On-Line Help Files (Internet Explorer or above)

Sound (vocalisation of important functions useful for visually impaired users)

Show Space Required (calculates and displays the amount of storage space required to hold a document/ image)

Printing

From time to time you may need to print out your documents so we have ensured that iN-FILE provides you with every available option...

All scanned in documents can be printed via:

Standard Print (as, when and in whatever format is requested at the time)

Auto Printed after Scanning

To a designated Printer (different printers can be selected via a drop-down menu)

to a predetermined:

Image size (i.e. 50%, 75%, and 100%)
Orientation (Portrait, Landscape)
Paper Size (A4)

Documents can be printed:

With or without annotations.





Security/ Monitoring Features

iN-FILE comes with complete Password Protection to prevent:

- Unauthorised users logging into the system
- Restrict access to certain databases/ filing cabinets (holding sensitive/confidential data)
- Audit Reports

Settings Include:

- Password Checking (which prompts users to change passwords every 3 Months)
- Minimum password length
- Minimum number of Alpha Characters
- Minimum number of Numeric Characters in a password
- Number of days before a password needs to be renewed

Logging In and Out Controls to:

- Log out after a defined number of failed attempts
- Auto Logout (after a certain period of inactivity)

Control over Database Access/Viewing Privileges

- Private Access (Only accessible to the creator of the database)
- Group (Accessible to users within a particular group)
- Public (Accessible to all **iN-FILE** users)

Control over User Capabilities

- Read, Write, Delete (Full Access to read, create, modify and delete all documents)
- Read, Write (Where the ability to delete documents is disabled)
- Read (Where only the ability to view documents is enabled)
- Supervisor (Gives a user the ability to manage iN-FILE)
- Group Supervisors (Enables users to add and remove users from databases they're responsible for)
- Restriction Modes (To limit who can search for certain documents and where they can be filed)
- View Only (requires License) this allows users to view files in the database, Print, Email and Export files and send files to other iN-FILE users through iN-2Mail, however they cannot delete or update the files.

Fine-tune capabilities to enable/ deny users the right to:

- Send Emails (through iN-FILE)
- Access the Internet (through iN-FILE)
- Use CTRL+L Functions
- Create and Edit Annotations (which can be fine-tuned to exactly which annotations can and cannot be used)



iN-FILE going forward:

iN-FILE is already under development with a new look and feel planned – but in keeping with the current version it will still retain the user friendly approach our customers love. iN-FILE will become Cloud based allowing users to log into iN-FILE via a web browser, with files being stored in the Cloud. Instate will be investing in new imaging technology eventually allowing users to be able to use their ipads, tablets and even smart phones to look through their files. Users will also be able to scan documents from remote locations, and eventually we will allow smart phones to be able to send images and photos direct into their iN-FILE iN-Tray or Database.

iN-FILE Pricing

iN-FILE	PRICE
iN-FILE Server License including one Full User License	£2,100
Additional Licenses – Concurrent	
iN-FILE (Full User License)	£950
Barcode Recognition (Automatically reads & indexes documents) Require one per scanner	£950
VIEW only (Read only License)	450
Additional Licences – Per PC	
iN-2Tray (TIFF image printer for office applications)	£350
Additional Licences – Per Server	
FTS (converts Tiff images into readable text for searching)	£1,750
iN-2Base (Import CSV file into iN-FILE database)	£850
iN-FILE Connector (save emails direct into In-Tray or Database)	£550
PDF (convert images into PDF format)	£500
SCAN To PDF	£400
OCR (converts text images into text)	£350
Support	
Telephone Support and updates (15% of software Investment Per Annum)	15% of List Price
On site call out charge (per day)	£ 700





Instate Other Services

Trust and friendly approach is central to the business philosophy at Instate, Our commitment to trust means we enjoy excellent relationships with key manufactures, enabling us to offer customers solutions built with the latest and most appropriate technology.

As a direct result of our ability to deliver solutions that span every business need, we enjoy very high levels of return business.

Accredited – to specify, supply, install, train and support a wide range of products, covering every aspect of business operations today.

Informed solutions – developed by a highly skilled and respected team, taking account of your current and future business needs, without the overhead of in-house experts.

Open and flexible development choices – without enforced manufacturer loyalty.

Management and business survival – project management and on-going facilities management to ensure optimum day to day performance from your system – and your budget – backed up with crisis services, such as disaster recovery.

Skill-building in your organisation – a very cost effective on-going program of technical, hardware and software training, which can be tailored to meet your specific needs.

Training

Instate are proud to offer a very cost effective on-going program of technical, hardware and application training delivered by experienced and highly qualified people.

We offer a combination of flexibility and professionalism to successfully support your training requirements, whether you are looking for:

- One-to-one training,
- Consultancy for specialist needs,
- Training delivered on site or at our training suites in Leeds.

We match skilled trainers to your needs, and the training can be tailored to meet your specific objectives. All of our training is backed up with documentation to support you when you are back at work.

Support Services

Instate offer a complete, effective service that you can count on. Delivered by our trained, experienced people.

Fast responses including a helpdesk for software and hardware.

Support you can trust, meeting agreed response times and contractual commitments, backed up with service contracts designed to meet the specific needs of your company.



Highly skilled staff, who regularly complete training on the wide range of systems we maintain for our customers

Direct links to manufactures and distributors to achieve rapid solutions.

Complete facilities management services.

Manufacturer certified engineers and support staff.

Networks

Analysis – we can give you complete analysis and evaluation of you existing Network and identify where potential improvements in performance and resilience can be made.

Cabling (data and voice) – a full range of high performance, warranted cabling systems, (both structured and unstructured for up to 15 years), to give your network systems a flexible and reliable infrastructure.

Design & Development – from conception to implementation, we work with you to develop an expandable, reliable network, using proven multi-protocol, multi-vendor technologies which can allow for your future growth. The services we offer include LANs, Wans, Internet Services, Intranets and Virtual Private Networks

Hardware – our skilled pre-sales support team have the knowledge and expertise to develop integrated solutions and offer a full range of leading edge hardware, backed by authorised partnerships.

Installations & implementation – our style of project management aims to ease your installation experience. We configure and bench marks all equipment to your exact needs at Instate, before beginning installation at your premises. From single site to multi-site, projects of every scale are effectively managed.

Systems migration & integration – whether you are changing your location, or just your hardware and software – with our commitment to expertise, excellence and first class support, we can promise a seamless, smooth transition with excellent support, for optimum system performance.

Telecommunications

Instate provide and support Avaya's IP Office and Zycoo small to medium sized business solutions. This service includes installation, commissioning and maintenance.

Both systems are IP based and can make use of the industries new technology SIP helping to lower your ongoing communications costs.

Software

Instate develop bespoke software packages, two on the current market are our Document Image Management Solution iN-FILE another being a Tanker Cleaning Management Solution called iN-Clean. We also resell a sales quotation system called QuoteWerks.

We also provide and support Microsoft's full suite of products including cloud solutions like Office 365.





In-Clean – Tanker Cleaning Management

In-Clean is a specialised software solution developed for the tanker cleaning industry. Instate was approached by the Tanker Cleaning company Fleetclean and asked to design a program which would allow them to make the cleaning process of road tankers as safe as possible, the software is also capable of creating the new European Cleaning Certificate.

In-Clean has been designed to meet all the legal requirements and produce certificates of compliance for the companies who offer a tanker cleaning service.

QuoteWerks

QuoteWerks is specialized software used in every industry for creating sales quotes and proposals. Rather than using Microsoft® Word® or Excel® to create your quotes and proposals, you can benefit from a tool that is specialized for the task of creating quotes and proposals.

QuoteWerks fits into your existing software environment. It works with the software that you store your customer information in like ACT!, ACT! for Web, Autotask, ConnectWise, GoldMine, Google Contacts, Maximizer, MS Dynamics CRM, Outlook, Outlook BCM, salesforce.com, SalesLogix, and SugarCRM eliminating the need to re-type customer information. QuoteWerks also has its own built-in contact database.

You can easily import your product information into QuoteWerks. QuoteWerks can link to product database sources like external databases, Excel spreadsheets, or text files. You can also just type product information directly into the quote. If you use QuickBooks or Peachtree, QuoteWerks can even quote products that you have stored in QuickBooks or Sage 50 - US Edition / Peachtree.

It integrates with your Accounting software like QuickBooks, Sage 50, Peachtree, or others through 3rd party Accounting add-ons so when those quotes become orders you don't have to re-enter your orders, and those orders can be submitted electronically to your vendors! All of this eliminates costly mistakes.

QuoteWerks has been empowering businesses for over 20 years - increasing their productivity and closing more sales by simplifying and speeding up their price quoting/proposal processes in the office and on the road

Onsite Backup – Off Site Storage

Instate are a reseller of the Datto Alto – Small Business Data Protection: Redefined.

Datto ALTO is an advanced backup, disaster recovery and business continuity solution that is easy to use, cost effective, and provides an insurance policy against costly downtime. Datto ALTO is the only solution to provide affordable intelligent business continuity to the small business space.



Supplier Accreditations

Strategic Partnerships

Partnerships and collaborations are a major part of business life today. Instate have built a framework of relationships with other major IT companies allowing us to offer the best possible solutions in an ever growing and competitive market.

-  Microsoft
-  Datto Alto
-  HP
-  DELL
-  IBM
-  Cisco
-  Netgear
-  Meraki
-  Sonicwall
-  WatchGuard
-  QuoteWerks
-  Avaya
-  Zycoo
-  YooZoom
-  Message Stream
-  M247
-  Vipre
-  Kaspersky

