

File Dynamics Limited is an independent company providing innovative file management solutions. The company was initially formed by a leading UK law firm to meet the needs of insurers, solicitors and other professionals in the litigation field, and we now provide a wide range of software solutions.

Our background provides us with an “insider’s” view of the requirements for practical computerised business solutions to meet the work pressures and budgetary needs of a busy organisation. With this viewpoint we will provide you with

- honest and open advice which you can trust
- practical working solutions which can be easily implemented
- systems which are intuitive and easy to use
- workflows with in depth legal knowledge and content
- high level technical support and training
- proposals which contain no future hidden costs
- a novel and fair pricing structure

Our systems have been developed so that they are as open as possible. This allows you to use your own internal resources and expertise to continue the development of functionality yourself (eg searches, reports, links to other databases and applications) without the need for further consultancy support.

Our systems can be integrated with other applications, collecting data or writing information back where necessary to ensure you maintain an integrated system across your business. We can also carry out data transfer from existing applications to ensure that your transfer to our system is seamless and that your valuable historical data is not lost.

Our file management solutions and extranet services are detailed in this booklet. If you need any further information or would like a demonstration then please contact:

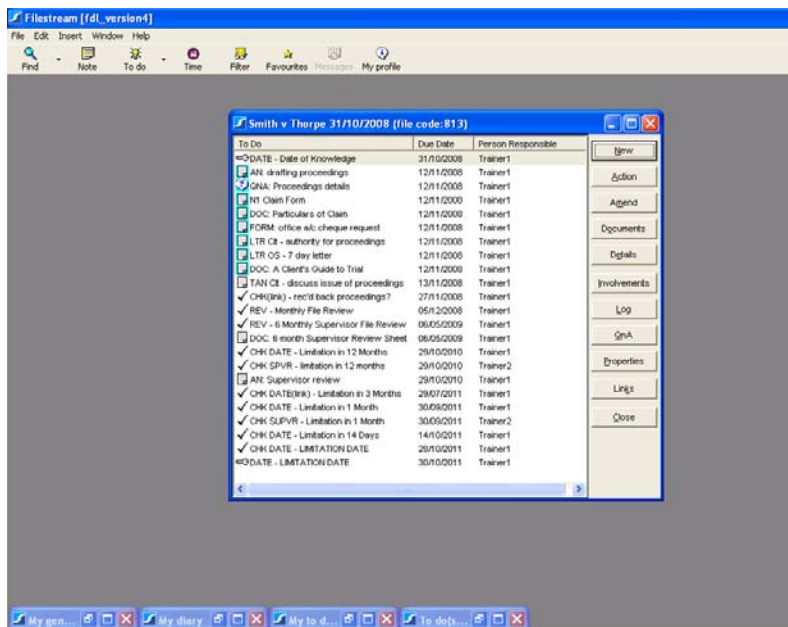
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## Why FileStream?

**FileStream** is the file management system provided by File Dynamics Limited.

The approach of **FileStream** is to provide help and assistance to users, while leaving the ultimate control with them. We do not aim to provide a system which is designed to take over and completely control a user, but to assist them in their work. This ensures that

- the system is flexible not restrictive
- users are not forced down standard processes which may not fit their specific file
- human involvement is maintained where needed
- “over-automation” is avoided



**FileStream** is there to make work efficient, and provide management information and audit trails to ensure the workflows are properly implemented. At the same time we believe any system needs to ensure that users do not feel threatened either in relation to their own ability, knowledge or application.

In our experience the “identity” of **FileStream** helps desensitise users to issues which often arise in the introduction of a computerised system. Whatever their preconceptions of new technology, most users find they develop a healthy and happy relationship with **FileStream**.

## **FileStream features**

### **To do lists**

- Flexible and filtered to do list
- Priority coding
- Secure supervisor and escalated activities to ensure service standard compliance
- Repeat activities for periodic reviews

### **Diary**

- Enables you to plan ahead your daily schedule
- Ability to view other users' diaries and plan meetings
- Can link entries to FileStream files
- Highlights important key dates from your FileStream files

### **Documents**

- Saving and retrieval of all documents
- Stores outgoing and incoming documents (scanned or network documents)
- Flexible document list
- Filter and search facility
- Complete integration with email (incoming and outgoing)

### **Rule Manager (version 4)**

- The ability to automatically complete other items to reduce the need for user interaction
- Assists with process auditing and validation

### **Time recording**

- Full time recording facility
- Integral to document production for maximum efficiency
- Document and time review facility for users
- Can connect and write to accounting systems

### **Details**

- Allows data recording for management reporting information
- Repeat activities prompt data update
- Schedule details for recording financial data
- Case level detail storage provides easy user access
- Global level details allows recording of system wide information

### **Involvement database**

- Database allows efficient creation of files and documents
- Includes complete list of courts and large insurer database
- Advanced search facility

### **QnA**

- The ability to ask questions and switch on/off subsequent questions depending on the given answer
- Can write back to details, involvements or remain stored on the QnA screen
- Presents the opportunity for telephone questionnaires

### **Web based management information**

- Instant user access to own system data
- Wide range of existing management reports covering:
  - time recording                      costs
  - service standards                      performance
  - activity and non activity              system compliance and reconciliation

**Web browser applications**

- Detailed search facility and conflict checker
- Online loss questionnaire
- Cost schedules

**System Development**

- Can connect to your own systems, including mainframe databases
- Open stored procedures allow own development of functionality and reporting
- Windows based workflow creation for own development
- Experience of successful transfer of workflows and precedents from other systems
- Scripting for automatic workflow selection

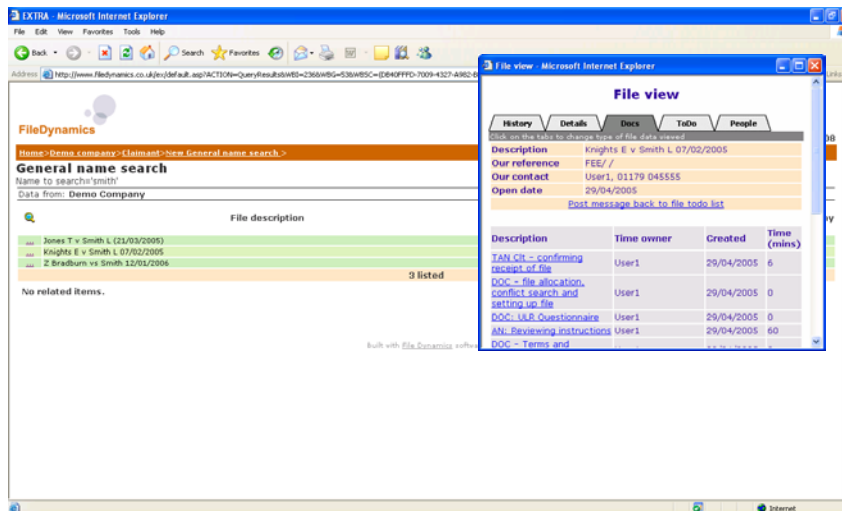
## Extra

**Extra** is the online service provided by File Dynamics Limited which allows you to view live file information.

Access can be granted to individual users and allows them to

- search for a file
- view the file information
- view documents on the file
- send a message to the file for the person dealing with the file
- run management reports
- read articles and use other services posted by you

**Extra** also allows you to provide online access for your own employees to file information and to their individual to do list, and they can then post time and attendances back to the file.



Example of search and file view

The **Extra** application tool allows you to set up and manage the service easily without detailed SQL server knowledge and to

- tailor the content for specific organisations or classes of individuals
- group the content
- provide different views for levels of users (eg managers) and security
- publish articles within specific groups
- link to other sites

As with our other solutions this ensures you can set up and maintain your service yourself without further external input and expense being required.

## Management reports

**Extra** can be operated internally to provide secure reporting within your organisation. An extensive range of management reports are provided to give you key management information on the files being run by your employees, including:

- financial information (time recorded reports, incoming and recovered costs)
- file instructions (new, current, closed)
- file information (type, value, age)
- activity reports (outstanding to do(s), time recording)

Management reports can also be made available online for your customers to run live themselves to query their matters being operated by you for any period specified by them. Your customers will also have the ability to send a message which writes back to the file and will appear in the to do list for that file.

FE	NI < ESK	NI ESK-E15K	NI > E15K	PI < E1K	PI E1K-E15K	PI E15K-E50K	PI E50K-E100K	PI > E100K	Advice	LBA	Invalid data
User1	4	0	0	1	2	1	0	0	1	0	11
User2	0	0	0	0	2	0	0	0	0	0	13
<b>TOTALS</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>24</b>

Example of a management report

We will provide you with the information you need to create your own management reports. Alternatively we can design additional reports on request. These can then easily be added to the system or extranet facility for immediate use.

## File array report

An array summarises information relating to a specific area of service. It enables you to view figures at a glance across all files.

Information from the individual files is warehoused overnight into file array. Pre-formatted calculations are carried out on the data, and profiles of the data are displayed through web based array viewers.

The arrays provide extremely powerful tools. The array viewer allows managers to:

- filter the data to show a different profile
- drill down to lists of all entries contained within data sets
- link to the individual live file
- build further reports on the selected data from the array



systems recognises this concern by giving you access to stored procedures which you can develop yourself.

This allows you to connect to your own mainframe and other systems, and develop other applications without depending on external providers to take any future steps. Our systems provide you with an essential platform to provide your services (both internally and online) and offers a good compromise between an off the shelf solution and a system which is written entirely in-house.

Our innovative use of the technology available and the flexibility of workflow development gives you a powerful tool to manage work which you outsource to other providers.

## Legal file management

A file management system is a vital part of any business providing legal services. **FileStream** and its processes provide the necessary documentation, checks and reporting functions, which you need to:

- carry out your work for your clients as efficiently as possible
- satisfy the requirements of your major clients
- demonstrate your ability to comply with your service standards
- produce management information and reports for your major clients
- satisfy the risk management requirements of your own liability insurers
- provide the platform allowing direct access to information by your clients through the internet and the electronic transfer of file information.

For users **FileStream** provides the following benefits:

- standard processes including all the steps for certain operations in your file
- standard letters and documents to save time
- detailed forms and precedents
- checks and reminders to ensure that time limits are not missed
- automated workflows for high volume work

## Workflows

We have developed comprehensive workflows for many types of legal work. These are all drafted in a working environment and used on a daily basis by our clients. The workflows are provided as part of **FileStream** so that you do not have an expensive or time consuming exercise of coding all your working practices before making use of the system.

Our legal file management workflows have been adapted for use in the insurance industry and allows you to manage your litigation processes (from outlay and ULR recovery to defending claims made against your policyholders) which are dealt with in your organisation.

The workflows include:

Claimant litigation:	personal injury outlay recovery small claims litigation	damage only ULR fleet claims costs
Defendant litigation:	small claims, fast track and multi track	
Commercial litigation:	banking litigation property litigation	professional negligence landlord and tenant
Employment:	contentious and non contentious	
Property:	residential sales	residential purchases

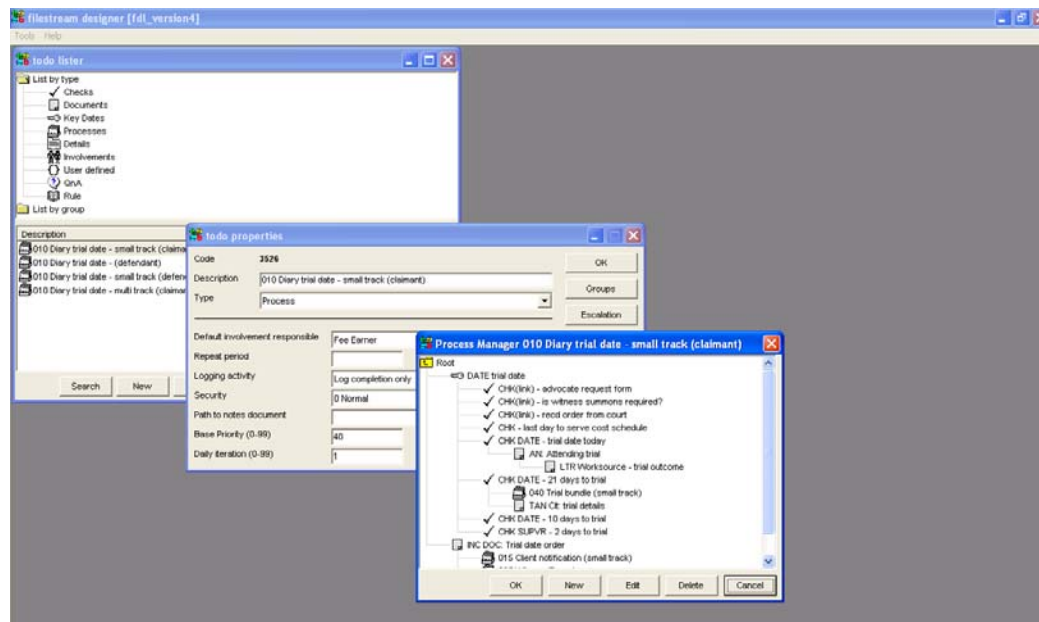
Our workflows are all documented and can be provided in paper format or as files which can be launched direct from **FileStream** in any web browser.

## System development

**FileStream** is not only a legal system and can be used to assist in managing any workflow or business process. A standard file opening process allows you to manage all your files across your business to benefit from the document management and management information even when documents and processes are not standard.

Installation includes **FileStream Designer**, the development tool which allows you to easily create and amend to do(s) within **FileStream**. This allows you to adapt processes to the specific requirements of your organisation and to develop the content in the future.

As part of the training and installation we will review any changes that need to be made to the processes for your individual requirements and assist you in updating these.



Example of a process design in FileStream Designer

## **Installation and Training**

At all stages in the implementation process we aim to avoid unnecessary charges and keep consultancy charges to a minimum. We also include your own staff in the installation so that you can control further development yourself.

We have developed a comprehensive training program provided by a full range of experienced trainers, including legally trained and qualified staff. Alternatively we operate a 2 day training course designed to train your own staff, so that you can be responsible for the implementation of the system and ongoing training.

If required, legacy file data can be transferred to maintain your historical information.

## **Support**

Support is provided by our dedicated support team, which not only includes technical operatives, but experienced users and trainers and legally qualified staff who can give direction on the best use of the system.

Dial in support allows us to respond immediately to any problems, backed up by on site assistance if required.

## **System communication**

We can link to other systems operated by you and set up relevant lines of communication for you to operate, eg automatic write back to your accounts system.

If you need to communicate with systems operated by other organisations xml files can be set up in the required format to facilitate the automatic transfer of data.

## **Archive services**

Our design allows us to move data to archive databases to maintain the efficiency of your system. The archive data can still be accessed, searched and included in your management reports so the value of the information is not lost.

## **Specification**

### **System requirements**

- Database format: SQL Server 7/2000
- Server operating system: Windows 2000/2003
- PC operating system: Windows 9x upwards
- Document production: Word 6 upwards

### **Server requirements**

- Dependant on precise site requirements
- For example 250 user site recommendation:
  - DELL Dual Core Processor 2900, 4 hard drives in RAID5 configuration, 4Gb RAM
  - Estimated server cost: £2000
  - Estimate SQL costs (with single processor licence): £4000

This is assuming that a separate file print server is in place with valid Windows client access licences.

## What people say about us

“The installation of the system and the transfer of our existing files and data to FileStream was very smooth, and well managed. The training and support was provided by people who had a knowledge of the legal issues involved in the processes as well as an ability to demonstrate the features of the system. This gave our users a greater understanding of how this could help them with their work and more confidence with the training program.

FileStream integrates well with our business systems and gives us the flexibility we need to work with our business development objectives.”

*Nick Addyman  
Partner  
Rymills*

“As part of our quality standards, DAS constantly monitors the service provided by solicitors to our policyholders. Since its launch, we have been impressed with Extra as a useful and informative tool which allows us to interactively assess the legal service provided at any time and without interrupting the fee earner.

The great benefit to our claims department is that we can see at a glance the status of the claim, the action taken upon it and the way that the fee earner is dealing with it.

It is also of considerable importance for us to be able to reserve accurately and this sort of innovative facility has great potential for allowing us to do so easily and cost effectively.”

*Fiona Harvey  
E-business Co-ordinator  
DAS Legal Expenses Co Ltd*

“The web based management information which we are able to obtain is invaluable. The high level management reports gives the statistical information which we and our insurer clients require, and the ability to automatically integrate the information from our branch offices is essential. The reporting information can also be easily accessed by the group leaders and individual fee earners which helps them measure their progress and achievement.

FileStream’s processes combined with the extranet give us the ability to demonstrate our ability to achieve the service standards which we and our clients expect and provide the transparency which is an essential part of our relationship.”

*Bernie Rowe  
Partner  
Lyons Davidson*