

capture | organize | archive | access | workflow

DocRecord™

*Dynamic Electronic
Document Management*



DocRecord™

DocRecord is a powerful, low-cost and easy-to-use software application for electronic document management. Designed to be intuitive, DocRecord is an elegant tool to reduce complexity and costs for businesses across all major industries.

DocRecord key features

- Retrieve documents at the touch of a button*
- Web-based access to documents for remote users*
- Organize documents with customized folders and views*
- Automatically categorize and index incoming documents*
- Search for documents quickly based on keywords*
- Convert documents into searchable digital files with OCR*
- Manage images with mark-up, annotation, and image enhancement*
- View documents in over 200 file formats*
- Store documents digitally in common formats*

DocRecord helps customers to

- Accelerate key business processes such as order processing and customer service*
- Increase customer responsiveness and reduce turnaround times*
- Improve document availability and access*
- Reduce storage costs and provide disaster recovery readiness*
- Eliminate lost and misplaced documents*
- Ensure flexibility and interoperability by using open technology standards*
- Leverage existing infrastructure and back-office systems*

DocRecord is both modular and scalable allowing businesses to configure the solution that is the best fit for their current business challenge and update it over time as their needs change.

How DocRecord Works

Capture Information

DocRecord captures information from across your organization seamlessly and lets you take control of your documents. Document imaging is made easy with DocRecord Imaging that captures scanned documents and uses OCR to extract a copy of the text for indexing and storage. Improve image management with mark-up, annotation, and image enhancement.

DocRecord manages information from a variety of sources across an organization's network. Easily watch network folders, watch queues, and integrate with other enterprise applications. With DocRecord, it's even possible for users to drag-and-drop files from their desktop into the system.

Categorize and Index Information

DocRecord sorts files into categories based on the attributes of the documents. DocRecord users determine which attributes are important fields to set up indexes on for their documents. This is usually based on their business scenario and who will be using the system.

Categories and indexes are completely customized and there is no limit on the number you can have in the system. These are important because they are the basis for searching for the documents after the files are committed to the system.

Organize Information

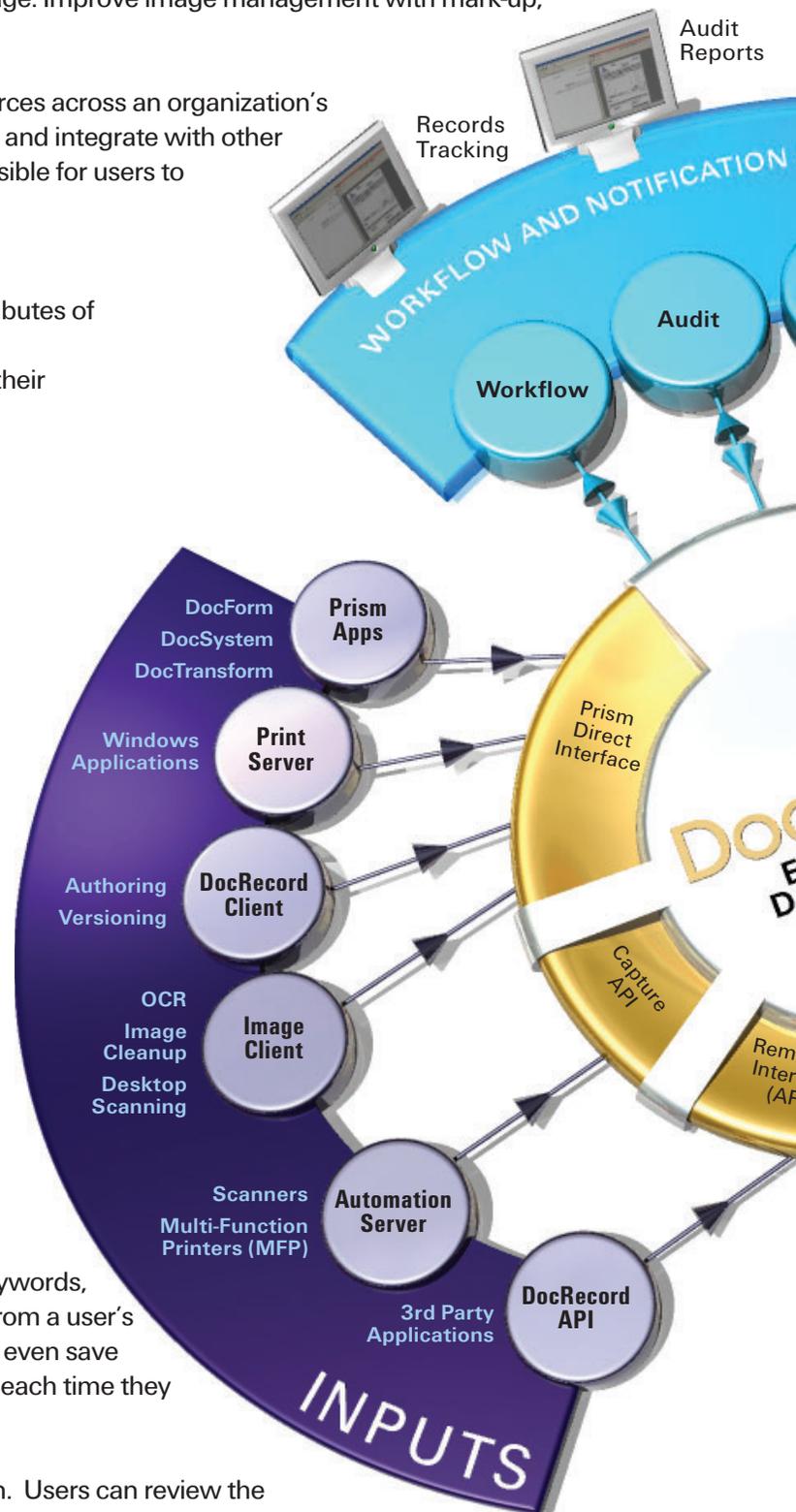
DocRecord organizes files by presenting all documents in a series of folders. Documents can be grouped together in folders based on projects, work processes, or document type to streamline business processes. Users define folders that best fit their business operations and expedite document retrieval.

A Work In Process area is another tool to help organize documents. This area is used to stage documents and assign them to the appropriate folders when they are first introduced into the DocRecord system.

Search and Retrieval

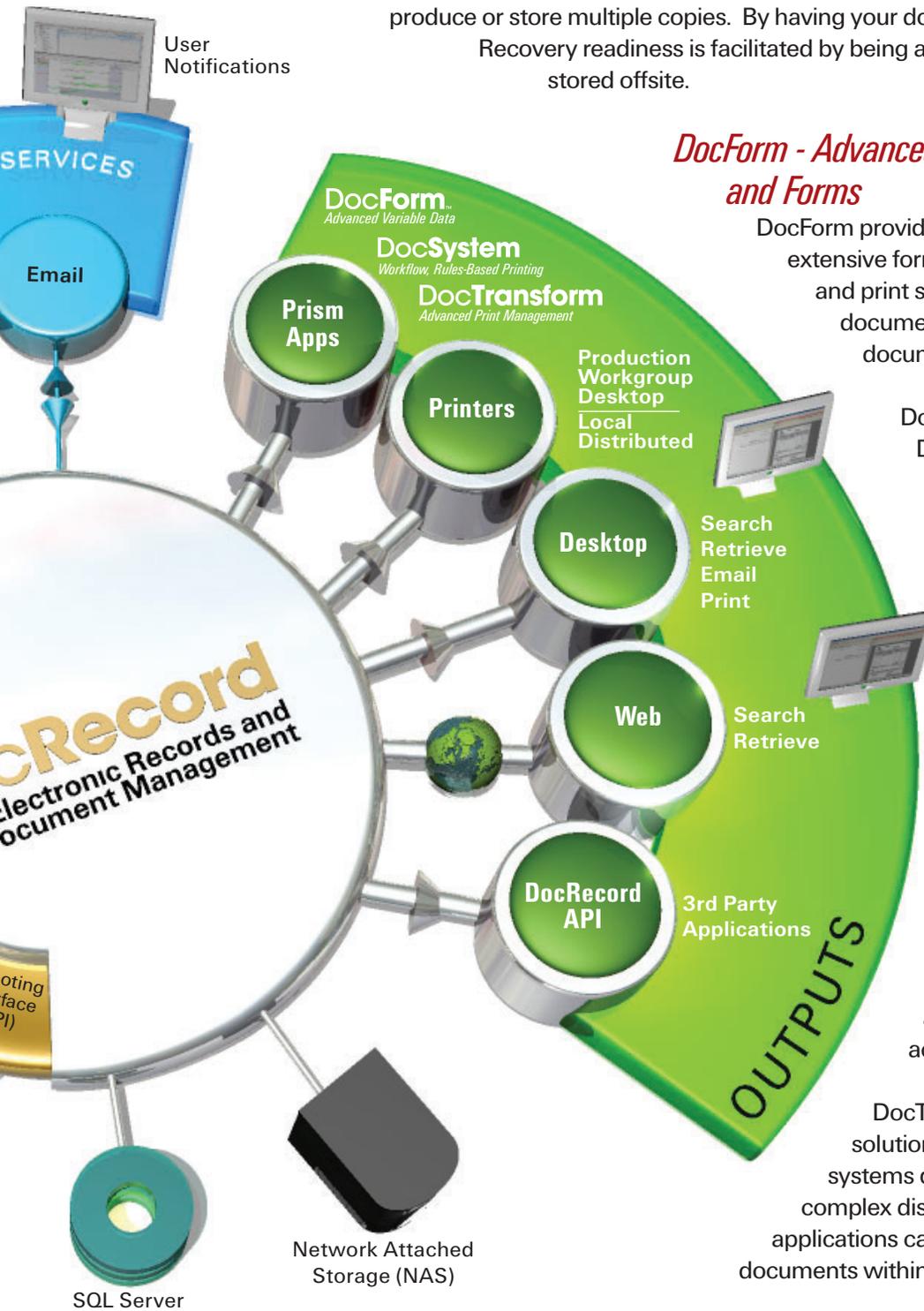
DocRecord offers multiple search options including keywords, index fields, and the folder tree. Searches can be run from a user's desktop or submitted via the web interface. Users can even save frequent searches, so they don't have to re-enter them each time they use the system.

DocRecord retrieves documents at the click of a button. Users can review the document onscreen and then take the needed action such as printing, faxing, or emailing the document. Users even have the option to view over 200 file types in their native formats, which is helpful when they don't have the necessary software application for the file they are interested in viewing.



Information Storage

DocRecord provides storage management for your digital documents. All records are efficiently stored only once, and through DocRecord's document reference system can be used repeatedly without having to produce or store multiple copies. By having your documents stored digitally, Disaster Recovery readiness is facilitated by being able to produce back-up CD's that are stored offsite.



DocForm - Advanced Variable Data Printing and Forms

DocForm provides dynamic composition and extensive formatting capabilities for documents and print streams. Use DocForm to both print documents and send digital copies of documents to DocRecord.

DocForm integrates seamlessly with DocRecord and produces PDF's, TIFF's, and other file formats for DocRecord to store and manage. DocForm also passes DocRecord pertinent reference field information for indexing purposes.

DocTransform - Print Stream Translation and Print Management

DocTransform converts complex data types and legacy print streams into standard searchable file types. It also provides powerful data normalization and print management capabilities to manage and control the flow of information across your organization.

DocTransform provides a packaged solution to integrate DocRecord with other systems quickly and efficiently. Even data in complex disparate systems and legacy applications can be converted into searchable documents within DocRecord.

DocRecord's base server and modules work together with your file and database servers to provide an efficient and seamless electronic document workflow.

Features and Benefits

Information Capture

Optical Character Recognition (OCR)

Accelerate business processes with conversion of paper documents to digital formats
Read, index, and store scanned documents

Network

Accelerate project development with faster implementations
Leverage existing systems and infrastructure

Desktop

Enhance collaboration and teamwork
Improve individual efficiency

DocForm

Integrate computer-generated reports, forms, and other documents
Reduce postage and courier costs for report distribution
Enhance decision making with timely access to reports

DocTransform

Convert legacy print streams such as Metacode, DJDE, AFP, and more
Create searchable documents from legacy print streams

Categorize and Index

Systematic document indexing

Eliminate lost documents
Better document management and control
Improved document tracking with unlimited number of categories and indexes

Automatic indexing

Accelerate business processes and streamline workflows
Save time and reduce administrative activities
Improve customer responsiveness and turnaround times

Organize Information

Customize document folder structure

Find and share documents more effectively
Save time by configuring to match your business process

Work-in-Process space

Identify and prioritize new document processing
Track employee work progress and manage quality
Increase process throughput and manage process bottlenecks

Search and Retrieval

Web-based access

Improve document availability for remote users
Eliminate "wait time" for physical documents
Reduce costs by using standard web browsers

Save searches

Save time by re-using prior searches

Native document viewing

Increase document access by being able to view over 200 file types without the need for original software applications

Document Workflow

Digital document workflow

Automate distribution and routing of documents
Centralize management of business processes
Improve communications with customers, business partners, and other internal departments

Rules and trigger conditions

Accelerate processes by eliminating manual work steps
Reduce errors by minimizing human intervention
Enhance decision making ability

Graphical business rules

Easy to design and edit business processes
Improve ability to analyze and track work processes

Information Storage

Digitally store files

Improve disaster recovery readiness
Easier document archiving
Manage document retention
Reclaim physical office space

Storage reference system

Efficient file storage by keeping only one digital file and eliminating the need for duplicate files

Standards-based storage

Save time and money by using standard databases and storage with no proprietary files or conversions
More flexible system for future growth plans

Product Applications

DocRecord is a valuable and mission critical tool applicable across a wide range of industries and departments.

Insurance

New application processing
Customer renewal processing
Customer inquiry and service management
Forms management archive
Regulatory compliance

Government

Agenda management, minutes, and records
Police and arrest records
Court records management
Employee records
Property records
Legislative management

Financial Services

Mortgage processing management
Client files management
Regulatory compliance - SEC & NASD
Sarbanes Oxley compliance

Healthcare

Medical records management
HIPAA compliance
Financial and billing management
Forms archive - HCFA, UB92, EOB, etc.

Legal

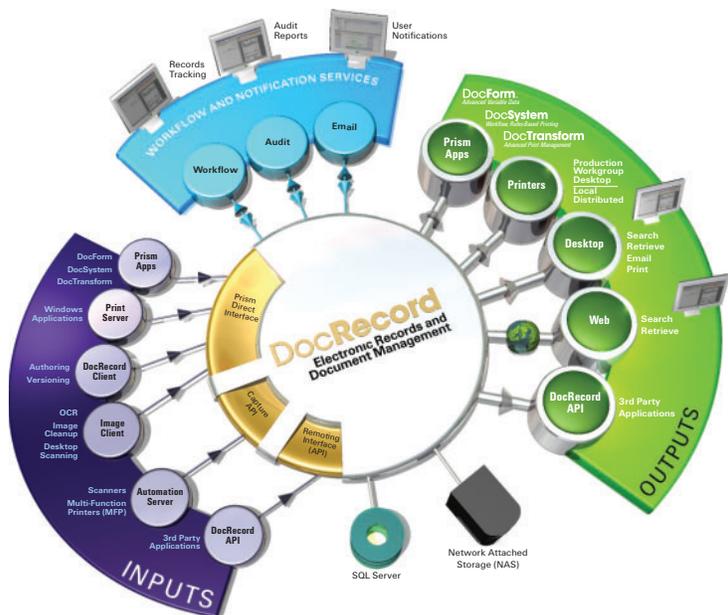
Case management
Practice management
Client record storage

Education

Student and alumni records
Course schedule records
Admission file management
Financial aid records
Transcript archive
Employee records

Manufacturing & Distribution

Bills of lading
Shipping manifests
Pick lists
Reports
Inventory documentation
Invoices and billing
Proof of delivery



DocRecord™ Modules and Requirements

All modules require an Intel Pentium 1GHz processor (2GHz recommended), 256 MB RAM (512 MB recommended), 17" SVGA+ monitor, Windows 2000/XP/2003/Vista, a CD-ROM drive, keyboard, and mouse.

Module	<i>DocRecord Server</i>	<i>DocRecord Desktop Client</i>	<i>DocRecord Automation Server</i>	<i>DocRecord Imaging Client</i>	<i>DocRecord Web Server</i>	<i>DocRecord Web Client</i>
Purpose	Manage document repository	Organize and share documents	Automatic document indexing	OCR and image management	Allow web-based access to documents	Web-based document search and retrieval
Benefits	Store documents efficiently	Assign indexes and categories Search, retrieve, and view documents	Faster document capture and indexing Less manual review and handling of documents More efficient document processing	Read and extract text from documents Improve document organization	Web-based access to DocRecord	Improve information availability Faster document retrieval
Users	IT Manager	Order processors Customer service Finance and Accounting	IT Manager	Document specialists Scanning personnel	IT Manager	Field sales reps Customer service Remote users
Prerequisites	-	DocRecord Server	DocRecord Server	DocRecord Server	DocRecord Server	DocRecord Server DocRecord Web Server
Disk Space	100 MB free	20 MB free	-	20 MB free	20 MB free	-
Storage	20 GB drive ¹	-	-	-	-	-
Database	Microsoft SQL Server	-	-	-	-	-
Web Server	-	-	-	-	Microsoft IIS ³	-
Network	10/100 Mbps	10/100 Mbps	10/100 Mbps	-	10/100 Mbps	10/100 Mbps
Software²	Antivirus	Acrobat Reader, Antivirus	-	Acrobat Reader, Antivirus	Acrobat Reader, Antivirus	Antivirus
Web Browser	-	-	-	-	-	Internet Explorer 6.0 or higher

1 1 GB per 20,000 pages; 2 Recommended software; 3 v5.1 and higher

