



The right
enterprise content management
software for your business.

Document Management That Makes Work Flow

Enterprise Content Management (ECM)
Document Management

www.document-logistix.com

OVERVIEW

With powerful capabilities - capture, electronic forms, e-signatures, workflow, records management and security - Document Logistix Enterprise Content Management allows organizations to securely manage and share documents, videos, photos and other content using enterprise document management and cutting-edge business process management tools.

Document Manager is the latest generation of Document & Enterprise Content Management product that has been providing businesses with document and process automation since 2000. **Document Manager**, helps reduce dependency of paper and toner, while streamlining business process.

Whether you are looking for a simple image archive or a complex business process automation solution with workflow, **Document Manager** offers the total solution in a variety of configurations to meet your business requirements. Select the functionality you need with a simple-to-use but rich and intuitive user interface that users will just love, ensuring quick acceptance and a rapid return on your investment.

Since 1996, Document Logistix has supplied the uniquely affordable and scalable **Document Manager** software to a varied range of SME and blue chip clients around the globe.

Document Manager provides a flexible platform for completely paperless business processes and highly efficient archiving. Our software powers the operations of some of the world's most demanding, high volume businesses including major logistics companies like DHL and CEVA.

WHAT CAN DOCUMENT MANAGER DO?

Businesses need smart operational processes and a comprehensive knowledge base with the ability to capture information, track, analyze, understand and report on key performance indicators (KPIs).

A company's real-time document knowledge base should comprise information on multiple daily tasks and transactions, asset management, revenue performance, contractual agreements and staff records, among other critical information.

Two major barriers that often prevent easy access to important information are that documents are not held in accessible, interpretable, actionable formats or information is housed in silos, where data is stored in separate blocks.

Such blocks may be a piece of software, like an accounts package, or a manual system where information is received and filed as paper documents. The key to putting information at the fingertips of appropriate staff, partners and customers is to remove the silo approach by bringing information together in accessible formats that make work flow.

Document Manager is a scalable solution that enables companies to deliver a departmental or company-wide document management strategy for capture, processing, storage and retrieval of critical information.

DOCUMENT MANAGER

Microsoft Partner

Document Logistix is a Microsoft partner. Therefore, the user interface is similar to that of a Microsoft Office product.

Users like to work with things that are familiar to them; the user interface is both simple to use yet fully functional and resembles many of the current generation of Windows applications already in use.

The user interface includes Explorer-type views to navigate the drawer and folder hierarchy, and a Microsoft Office-style Ribbon Bar provides easy access to program features. Right-click on documents or folders to quickly access the available menu of options.

Summary information is displayed in columns similar to spreadsheets, which can be sorted and arranged to suit the user. Open multiple folders or search results using different tabs and switch quickly between them. A preview of images beneath the document list assists in locating the document you are looking for.

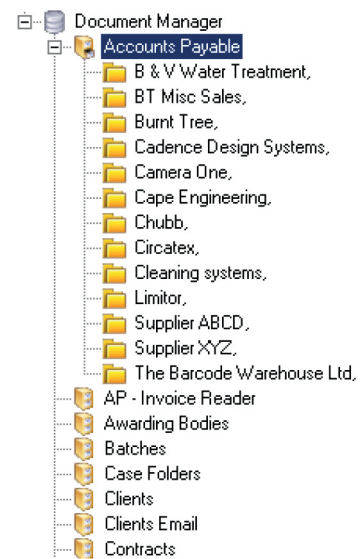
DRAWER STRUCTURE AND FILE HIERACHY

A **Document Manager** database is divided into Drawers; each drawer is focused on a specific business function, for example, HR or Accounts Payable. Each drawer has its own indexing schema and permissions for different users and groups. Drawers are further divided into folders and sub-folders.

Each folder has a set of indexes associated with it, such as Employee Details or Customer Details, and can have permissions associated with them. Documents are held in the folders or sub-folders, again with specific indexes associated (such as Invoice Number or Date) and again can have specific permissions associated with them.

FILE TYPES

Whatever document types your organization works with, **Document Manager** can work with them: any file that has a file suffix associated with an application can be managed by **Document Manager**, including documents, pictures, movies, sound recordings, CAD, etc. For Microsoft Office (2003, 2007 and 2010) documents, there is an Office integration module allowing documents to be saved to or opened directly from **Document Manager**.



DOCUMENT SCANNING

Document Manager supports TWAIN and Kofax® VRS-based scanners (32-bit and 64-bit) and scanning from disk for network-connected multi-functional devices. The HTML 5 Web application deploys a 'click once' scan application to the workstation (Microsoft Windows clients only), which will perform the scan and indexing and then upload the documents to the server. It supports automatic pagination of documents (using barcode or blank pages) and OCR automated indexing for populating the document indexes.

BATCH SCANNING

For high volumes of documents, use the optional Batch Scan module. This provides automatic capture of documents with multiple fields read using either Barcode or OCR. Suitable for either form-based documents with key index fields in fixed positions, or free-format documents, such as Purchase Invoices, where every document is different. Data read can be cross-referenced against databases such as suppliers or open purchase orders to ensure validity and integrity.

The resulting documents are saved to **Document Manager** either for simple archive or subsequent approval workflows, and corresponding data can be exported to business systems like ERP or Finance, removing the need for teams of staff to perform manual data entry.

OCR-OPTICAL CHARACTER RECOGNITION

Document Manager is supplied with integrated OCR allowing the system to read key information when indexing scanned documents, without having to type everything – simply drag the mouse pointer around the text to be read and **Document Manager** will read the text into the field being indexed.

Document Manager also integrates with other OCR engines allowing the fully automated scanning and indexing of documents.

Other Document Scanning Features Include:
Scanning both sides and discarding blank sheets automatically
Saving scanner preferences like paper size and resolution in easy-to-recall profiles
Clean up images using the inbuilt noise reduction, smoothing and black border removal tools

INDEXING

In order for the “Search and Retrieval” aspect of **Document Manager** to work, users are required to index (categorize) every folder and every document that is added to **Document Manager**. Entering values in to the index fields assists in efficient and accurate searching and retrieval of documents.

The invoice to the right is scanned and when added to **Document Manager**, the values for the Invoice Number, Invoice Date, VAT Registration Number, Company Name and Total Amount are entered into index fields.* The result of indexing allows other users to easily and quickly search in **Document Manager** for any of these values.

**Indexes will be tailored for each customer*

Invoice To:
A Happy Customer
31 Over There Court
Customer World
CW8 7QT

DOCUMENT LOGISTIX
MAKING WORK FLOW
Document Logistix Limited
8 Copperhouse Court
Caldecotte
Milton Keynes
MK7 8NL

Company Name

Invoice

VAT Reg. No.	Purchase Order Ref.	Tax Date	Invoice No.
111 2222 33	P01790	31/05/2013	INV002843

VAT Registration Number **Invoice Date** **Invoice Number**

SUBTOTAL	
1280	
DELIVERY	N/A
V.A.T	256
TOTAL DUE	£1536

Invoice Total

Payment is due within 30 Days.
UK Company Registration No 987654

SEARCHING AND RETRIEVING

Document Manager employs easy-to-use search dialogs based on one or more fields with simple drop-down lists for plain language conditions like ‘Equals’ or ‘Starts With’.

There are two ways to search within **Document Manager**. Search by Folder and Search by Document.

The example below shows how there are different fields that are search-able by folder. Search by Folder

Search for Folder

Drawer: Human Resources-US
Permission: Any

Field Name	Filter	Value
Last Name		
First Name		
Employee No		
Department		
Employee Status		
Date Created		
Retention Policy		
Sub Folder Name		
Access From		

Search by Document

Search for Document

Drawer: Human Resources-US
Permission: Any
☐ Exclude subfolders from document search
DocType: Any
Content:

Field Name	Filter	Value
Doc Description		
Last Name		
First Name		
Employee No		
Department		
Employee Status		
Doc Sub Type		
HR		
USER		
Status		
Date Created		

Searching by document provides more options such as: Content (or Full-Text-Search), Document Type, or a combination of the different values and folder level indexes such as Last Name.

SAVED SEARCHES

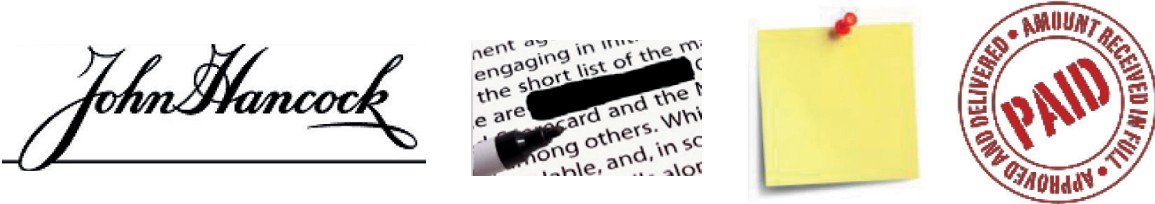
Save frequently used searches to be re-run at the press of a hotkey, or select from a drop down list of 'favorite searches', and share those searches with other users.

VIEWING IMAGES

View images with the same intuitive Ribbon Bar providing access to everything needed to view and work with image document types.

Annotations, Redactions, and Image Stamps

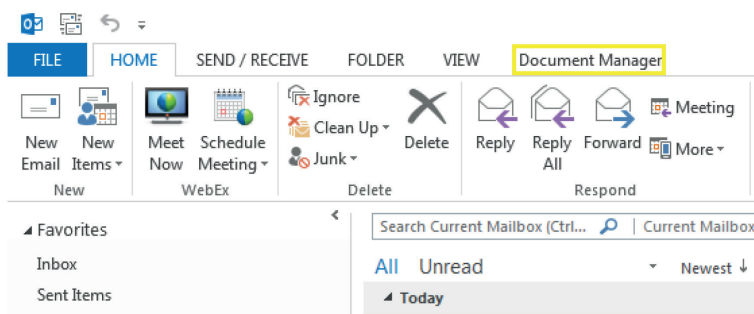
Annotate the document with drawing tools including Sticky Notes, Highlights, Lines, Text and Image Stamps. Hide sensitive parts of documents using redactions and define who is allowed to see what.



Microsoft Integration

Document Manager integrates with Microsoft® Office and Outlook® 2003, 2007 and 2010 allowing messages and/or their attachments to be saved directly from Outlook to **Document Manager** as .msg files.

The optional Email Archive module allows for automatic archiving directly from Microsoft® Exchange (2003 SP1 or later and supporting Journaling). Both incoming and outgoing mails can be archived and rules can be defined to allow copying of emails to specific folders related to staff, clients, suppliers etc.



ON-PREMISE OR CLOUD BASED

Purchase or Subscribe: Choose whether to install within your organization or subscribe to our Software as a Service (SaaS) for a simple monthly fee per user; **Document Manager** is the right answer, whatever your preferred business model.

DOCUMENT MANAGER STANDARD FEATURES INCLUDE:

DESKTOP SCANNING:

Scan documents from the desktop directly into folders within **Document Manager** using readily available TWAIN-based scanners or network scan devices. Automatically paginate into documents using separator sheets with barcode or blank pages.

DOCUMENT ENCRYPTION:

Encrypt documents in the native file store to prevent unauthorized access even by IT staff who know network-level details and security.

FULL TEXT SEARCH:

Locate documents across all drawers by their content. Useful for locating documents based on their subject matter to compare similarities, for example, previous orders or proposals.

VERSION CONTROL:

Two levels of version control for document authoring. Show only the latest version of a document. Make previous versions read-only. Associate new documents as new versions of existing documents.

CHECK IN / CHECK OUT:

Take a document out of the system for working offline. Prevent other users working on it, warn them who has the document but allow read-only access to it. Optionally check the document back in as a new version.

AUDITING:

Document Manager keeps a record of every system access and records the identity, date, time, network address or workstation and what was done. Vital for legal admissibility and compliance. Even when documents are deleted, the audit records remain accessible. Report on audited events such as Document Deletions.

ENHANCED ADMINISTRATION:

Define users with restricted administration permissions, so IT staff do not need full administration permissions.

ANNOTATIONS:

Add markups to images to show comments or draw attention to key items. Restrict who can view, modify, change or delete the annotations and audit who has done so. Add personalized 'signatures' to images when workflow actions are performed. Each signature has access permissions associated with it.

SCREEN SCRAPE:

Document-enable your other systems with no API or coding by teaching **Document Manager** how to find the key information on their screens.

SECURITY

Whatever the application there are always concerns over security and privacy of information accessible via the public internet. Ultimately nothing is hack-proof, as evidenced by the ever frequent high profile news stories of Government agencies or Social Media sites being targeted, however, there are steps that can be taken to minimize the risks, and limit any consequences.

Complete control over access to documents provides compliance with requirements like Sarbanes Oxley, Freedom of Information and other industry-specific requirements like HIPAA. A complete Audit Trail is maintained providing legal admissibility and visibility of every access to the system. Independently penetration tested for security by NCC Group.

Document Manager Offers Additional Security Such As:

Access Control and Permissions:

Access control and permissions determine what actions can be performed in **Document Manager** and in which locations. Access rights define where a user is allowed to go within **Document Manager**. Permissions determine what a user or group can do within the system.

Document Encryption:

For each document type, encryption can be enabled to increase security. When encryption is set for a document type and a document of that type is stored or saved to **Document Manager**, the document is encrypted. When the document is opened by a user with appropriate permissions; it is decrypted.

Auditing:

Every time a user or group does anything to a document or folder in **Document Manager**, it is recorded in an internal audit record within the **Document Manager** database. If the audit file has been saved into **Document Manager** (read-only), **Document Manager** prohibits the deletion of the audit file.

Active Directory Integration:

Active Directory enables administrators to import Active Directory users and groups that have already been set up for your organization into **Document Manager**. It also enables existing **Document Manager** users and groups to be synchronized with Active Directory users and groups.

INTEGRATION

The benefits of document management are greater when integrated into existing business systems. Document Logistix has a proven track record of delivering integrations for popular business systems including: Oracle®, SAGE®, JD Edwards®, and SAP®.

Whatever your application, such as Finance, HR and CRM, the documents you want are only a click or two away using either our 'Screen Scrape' (Code Free Integration) technology or a tighter integration using one of our Application Programming Interfaces (APIs).

ON-PREMISE INSTALLATION

Database

The database services are provided by Microsoft® SQL Server® 2005, 2008, or 2012. A Core Services module provides all the business logic and core functionality, which is accessed from the Web Server application running on Internet Information Services (IIS) version 6 or 7.

CLOUD INSTALLATION

Browser Requirement

DM5 should work on any Web Browser supporting HTML 5. DLX develop and functionality test with Internet Explorer 9, 10, 11, Google Chrome 36 and Safari on Windows 7, Windows 8, iOS (iPhone and iPad all models) and Android[Samsung Galaxy/Google Nexus]. For up to date HTML5 browser compatibility refer to <http://html5test.com/results/desktop.html>

Our Cloud Solutions manage all your electronic documents whether they are digital images, Word documents, PDFs, emails and any other digital files in a secure, SSAE 16 data center. You can store all your valuable content in a single repository, retrievable over the web at any time from any place. Whether you need Software as a Service or just hosting, we can accommodate your needs.

LICENSING

1. Full (or Standard) vs. View Only Licenses

Full (Standard) License: Allow users to add, edit, view, open, search, retrieve, email, print, and export (within given permissions)

View Only License: Allow users to view, open, search, retrieve, email, print, and export (within given permissions)

2. Named License vs. Concurrent License vs. Hybrid License

Named License: Requires one named license per user

Concurrent License: Concurrent licensing limits the number of users that are able to login at the same time, but you can define/add as many as you wish. Ideal for temporary or part-time workers and shift work. Ex: With 10 Concurrent licenses, 10 users can be logged in at the same time, however an unlimited amount of users can share those 10 licenses.

Hybrid License: Combines Named and Concurrent Licensing with Standard and View Only access.

DOCUMENT MANAGER PRODUCT SUITE

1. DOCUMENT MANAGER WEB

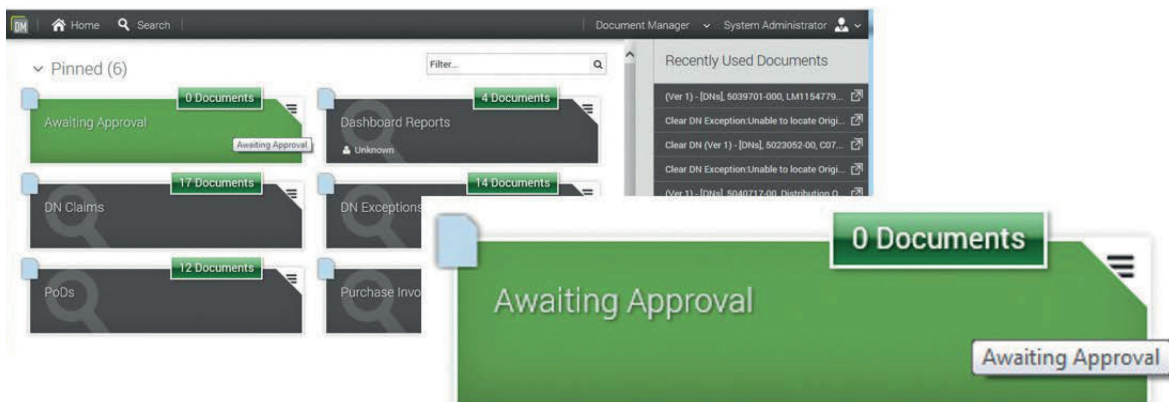
Document Manager 5 (DM5) is a web-based application of **Document Manager** designed to either work in conjunction with existing on premise installations of **Document Manager** Enterprise edition.

DM5 has smart, rich functionality right now, with some great business tools, which include a dynamic graphical Workflow Designer. Using HTML 5, it is designed to be both functional and easy to use while providing compatibility with a wide range of devices and operating systems, including PCs, Tablets and mobile phones. In addition, it provides the necessary services to support DM Mobile for iPhone.

DM5 presents a new way of using **Document Manager**, is feature rich and provides a pleasant, responsive user experience. HTML 5 is widely recognized as the industry accepted standard and is being supported by all leading hardware and software vendors. It allows rapid development of functionally rich content that will work on a wide range of devices.

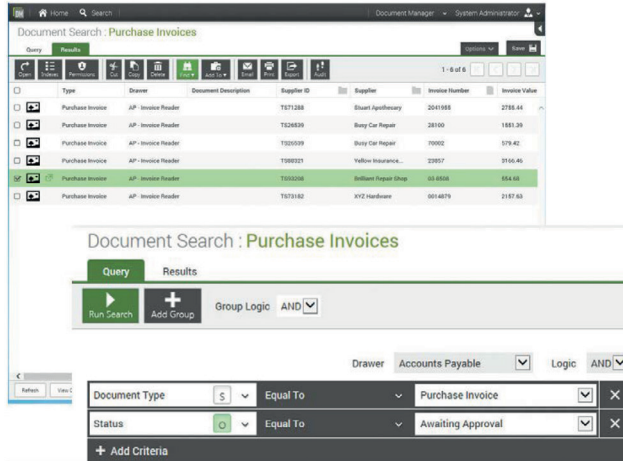
We had a complete rethink when designing DM5 and at every stage of development we have considered what our users will want from the product: ease of use, intuitive interfaces and uncluttered screens that optimize available space.

When users first login they are presented with a list of predefined searches that tell them, without having to search and look, whether there is anything requiring their attention.

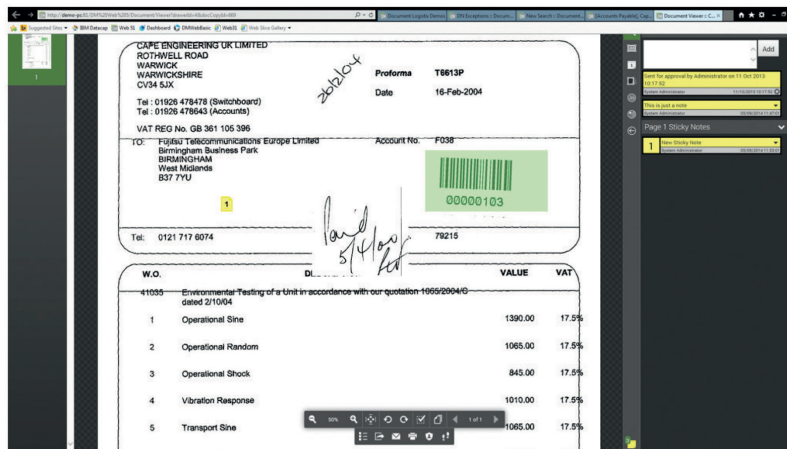


DOCUMENT MANAGER PRODUCT SUITE

Searches are easy to create, yet can be complex without being complicated. Simply define the criteria from the guided drop-down selections. Combine multiple conditions with AND / OR logic and run the search.



The document viewer dynamically hides the toolbars to make best use of available screen space, but super-imposes them when needed. Annotation tools can be used to highlight, redact (part hide), stamp or comment on the document.



BUSINESS PROCESS AUTOMATION TOOLS

2. WORKFLOW

Every business, from manufacturing to education, has processes to handle its information flows – from invoice processing to customer complaints management. These are often paper-based, relying on internal mail systems. The more streamlined a business can make its processes, the more effective that business will be. **Document Manager** provides Workflow software that integrates seamlessly with existing systems to automate business information processes. The software has helped many large companies to dramatically increase the speed and reliability of their internal processes.

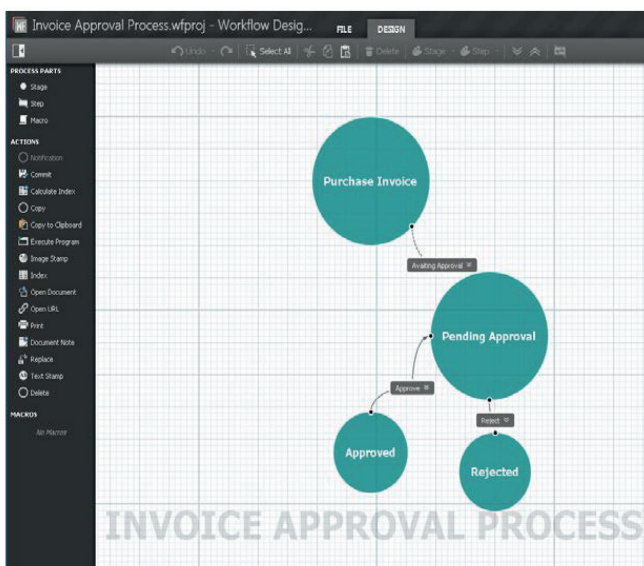
Document Manager Workflow is a robust, scalable automation engine for every type of document process. It provides businesses with tools to design and build efficient information flows that implement business logic, rules and policies.

For example, Workflow can automate a paper-based Purchase Order (PO) approval process. With Workflow, the business can control PO creation, configure a sequence of notifications to approvers, and can engineer how approved POs will be filed for future reference.

Workflow allows complete control of the status and movement of a PO at every process point, removing any doubt about the path that each document will follow.

Workflow coordinates the software and individuals within a company into one successful, automated process – cutting process time, cost and errors.

Document Logistix' graphical workflow designer allows administrators (within given permissions) to easily draw out business processes and apply them into **Document Manager**.



BUSINESS PROCESS AUTOMATION TOOLS

3. MOBILE

Throughout the lifespan of a business, things will unexpectedly come up. Making yourself readily available to work at a moment's notice is important. Whether at home, away on vacation or traveling, it is extremely beneficial to have immediate access to your documents and company information.

Cloud based or mobile-ready document management software gives any business the power to work more efficiently. As a mobile solution, document management software provides end users with the ability to access documents through a smartphone or tablet device. Leveraging the power of remote accessibility delivers a number of benefits including, an increase in employee productivity, and communication. Providing the opportunity to get more done, and increasing customer service.



4. EFORMS (ELECTRONIC FORMS)

For decades, businesses have relied on paper forms to collect information from customers and business partners, and others have printed electronic documents simply to obtain required signatures. However, paper records are vulnerable to theft and loss as they are routed through business processes, and they do not integrate well with computer systems that require electronic data.

To boost business efficiencies, reduce cost, and to tighten information control, many organizations are turning to workflow, electronic signatures and e-forms applications to complement their existing data management strategies. E-forms enables companies to digitize data from the point of origin by collecting customer information using an electronic form. Once collected, workflow automates the flow of the information through business processes, including obtaining legally-binding signatures on contracts and other documents. When used together, these three technologies can significantly boost staff productivity for common processes such as new customer account creation, contract execution or invoice approvals.

BUSINESS PROCESS AUTOMATION TOOLS

5. RECORDS RETENTION POLICY AUTOMATION

Document Logistix makes records retention simple to take the headache and uncertainty out of admin and compliance. Electronic document management (EDM) means retention criteria are assigned dynamically when documents are loaded; the appropriate retention of documents and automated destruction is managed automatically in the background. No need to label storage cabinets or worry about remembering when a document's time is up.

With a robust configurable tool, select from a number of options such as: send a notice before purging, purge by date, purge by document type, and much more.

6. DOCUMENT LOGISTIX REPORTING



WEB BASED – REAL TIME – GRAPHICAL – CROSS FUNCTIONAL

The dashboard is a browser-based application that allows users to access real-time data quickly and present it in customizable and visually appealing charts, tables and speedometers.

Track your KPIs, get trend alerts and drill down to the underlying data or documents to examine issues and compare over time.

Dashboard provides a top down view of your business data allowing you to cut through complexity quickly to make proactive, timely and informed business decisions to improve performance. You can choose to receive instant alerts if a KPI threshold is crossed - for good or bad. The dashboard also allows you to have a single, consolidated view of all your disparate management data, bringing together information from multiple sources including: **Document Manager**, finance and accounting software, HR, payroll, CRM, Service Desk, spreadsheets and ERP.

SYSTEM REQUIREMENTS

Database Server	Microsoft SQL Server 2005, 2008, or 2012 2 GB RAM minimum
File Server	Any device presenting an SMB-based File Share with Active Directory permission management. Budget 1 GB per 20,000 A4/ Letter-size pages (assuming an average of 50 KB per page for a scanned image at 200 DPI monochrome).
Core Services Server	Microsoft Windows Server 2003, 2008 or 2012 (32-bit or 64-bit) 2 GB RAM minimum Microsoft® .NET Framework version 3.5
Web Server	Microsoft Internet Information Server (IIS) 7 4 GB RAM minimum, 1 GB Available Disk Space
Full Text Search Server	Windows Server 2003, 2008 or 2012 (32-bit or 64-bit) 1 GB RAM minimum
Web Clients	Any Web Browser supporting HTML 5. At time of writing, one of: Internet Explorer 9, 10, 11, Safari, Google Chrome 36 For up to date HTML5 browser compatibility refer to http://html5test.com/results/desktop.html
Rich clients (optional desktop)	Windows® XP, Windows Vista® or Windows® 7 with minimum 512 MB RAM (1 GB recommended). Microsoft® .NET 3.5 Framework is required NOTE: A Windows Desktop (rich client) version is available to Enterprise users, for those who prefer traditional desktop clients, or have a specific desktop integration requirement.
Scanners	TWAIN-compliant scanners. Please refer to our compatibility chart of recommended manufacturers' devices. Kofax VRS is recommended for image enhancement and cleanup.
Email Archive Service (optional)	Windows Server 2003, 2008 or 2012, Windows 7, Windows Vista or Windows XP (32-bit or 64-bit). Microsoft Exchange or Outlook client is required on the machine.
Batch Scan with OCR (optional)	Windows Server 2003, 2008 or 2012, Windows 7, Windows Vista or Windows XP (32-bit). Minimum of 1 CPU Core and 1 GB RAM for simple requirements to 4 CPU Cores and 4 GB RAM for advanced requirements, such as invoice recognition.
Simple Web Retrieval (optional)	Internet Information Services version 6 or 7. 1 GB RAM minimum. .NET Framework 3.5 if Active Directory integration/authentication is required NOTE: This option is available to those who only want to use basic Web features as opposed to the full functionality offered by DLX 2011.



**DOCUMENT
LOGISTIX**
MAKING WORK FLOW

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