



DocRecord™

# Enterprise Content Management

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Instantly access, automatically capture,  
and workflow process documents,  
emails, content and data



**prism**  
software

DocRecord 6



## DocRecord is an all-inclusive ECM platform for automating the processing, storage, and retrieval of documents, content, emails, and data.

DocRecord is simply priced by the concurrent user. Its all-inclusive capabilities include:

- *Document Capture & Data Extraction*
- *Workflow for Business Process Automation*
- *eForms & Automated Data Collection*
- *Network Folder Migration*
- *Automatic Document Creation in Workflow*
- *Customer Portal*

With DocRecord, instant access to, and automated capturing and processing of, your organization's documents, emails, data and other content provide significant operational efficiencies. These efficiencies yield substantial and immediate savings in labor and other expenses. These increased efficiencies also allow significantly faster response times to both customers and employees.

DocRecord is an all-inclusive application that is priced by the concurrent user and not by the architecture or capabilities. Essential key features and capabilities, usually priced separately in other ECM applications, are included in the core DocRecord application. This keeps costs low, both at the time of purchase and over the life of the product.

And, since everything is included it's easy to determine your organization's implementation requirements. These core product capabilities and features are what organizations require to eliminate manual processing and provide instant, anywhere-access to their content. Anywhere records-access includes all the ways you work: Over the web, integrated with Microsoft Windows Explorer, integrated with Microsoft Outlook and Word, through third-party applications, or with a dedicated desktop application.

## Benefits of ECM with DocRecord

DocRecord provides substantial cost-saving and process improving benefits to organizations. DocRecord makes it easy to quickly achieve these savings and benefits with an affordable and all-inclusive platform.

Common cost saving and process improving benefits include:

- *Documents and content instantly searchable and accessible from both mobile and desktop*
- *Automated recognition and filing of documents into correct folders with extracted metadata*
- *Customizable automated workflow processes replace manual document processes*
- *Automated accounting, HR, legal and other departmental documents processing*
- *Easy data capture and workflow processing with eForms*
- *Auto-fill of forms from eForms data capture*
- *Access DocRecord data from other line-of-business applications*
- *Significant improvement in employee and customer response times and more*

# About DocRecord

Each DocRecord concurrent user gets complete access to all the core advanced features of DocRecord including:

- *On-Demand, Instantly Available Documents & Content*
- *Automated Capture and Data Extraction & Filing for Documents and Data*
- *Workflow and Automated Document Processing*
- *eForms for Data Collection and Processing & Automated Forms Creation*
- *Network Folder Migration into DocRecord*
- *Automated Document Creation in Workflow*
- *Customer & Vendor Records*



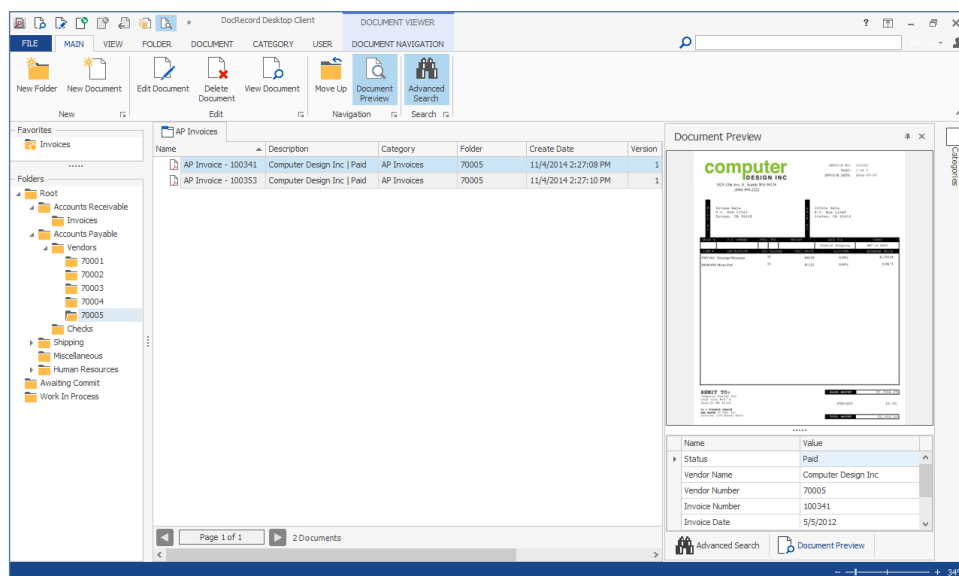
## User Access

An organization needs to provide its employees instant and secure access to its important documents, records, and other content. And, they need this access anytime and from nearly any device. DocRecord provides multiple access methods for clients to match their access requirements at that moment – desktop, mobile, or and many others.

### Desktop Users

DocRecord provides a Windows-based, desktop application that provides the full power of DocRecord including:

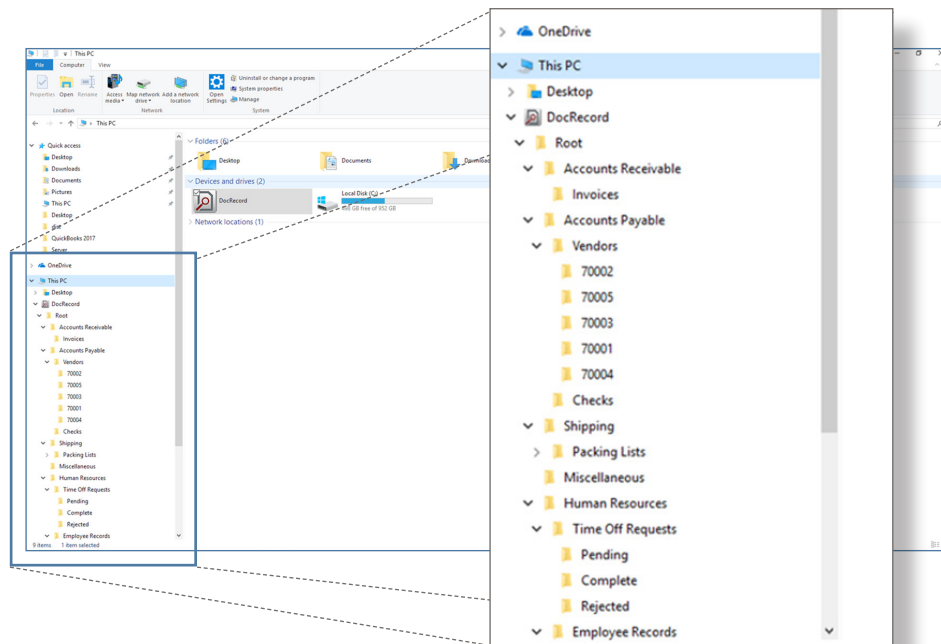
- *Quick search*
- *Custom intelligent search*
- *Workflow integration*
- *Document preview*
- *Indexing and metadata*
- *Annotation & PDF document markup*



Desktop Client

## Microsoft Windows Explorer Users

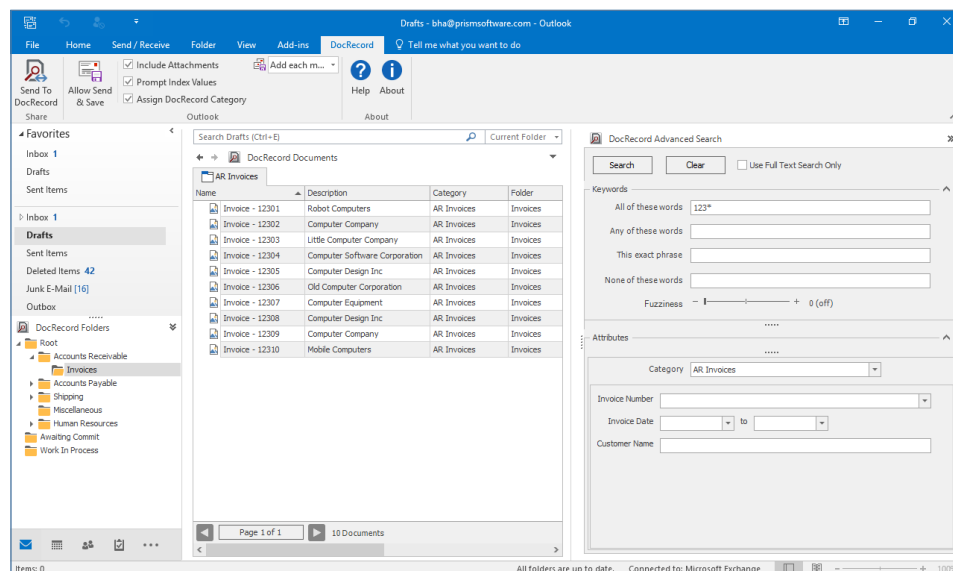
DocRecord is fully integrated into Windows Explorer making it intuitively easy to instantly learn and use. This Windows Explorer integration provides DocRecord with the same familiar interface where DocRecord folders simply look like a shared drive on the network. DocRecord allows you to continue to easily work with your records in the same way as you always have worked.



*Easily work with your records using DocRecord's integrated Windows Explorer*

## Microsoft Outlook and Word Users

DocRecord is also fully integrated from within the Microsoft Office applications Outlook and Word. Within each of these Office applications, users can access, retrieve and deposit records into DocRecord folders. This comprehensive Microsoft Office integration allows users who work primarily within these applications to not have to switch to other screens or applications to complete their work. This saves valuable time and processing steps for those Office-centric users.

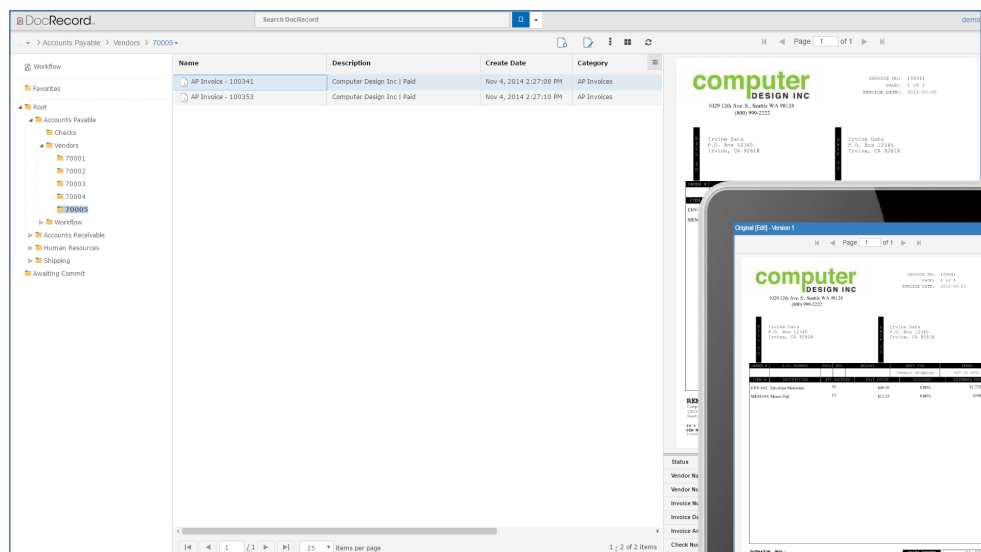


*Fully-integrated Microsoft Outlook client*

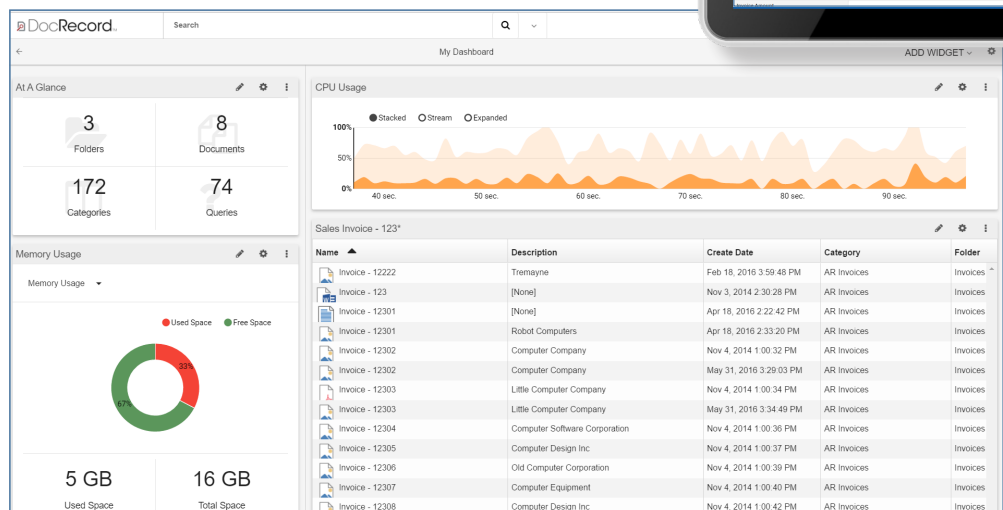
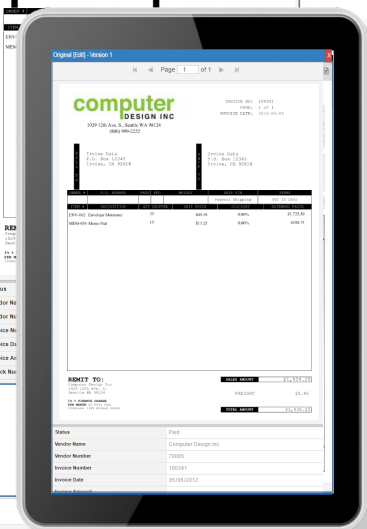
## Mobile & Browser Users

Both remote and on-the-go workers need to access both records and workflow. DocRecord provides a comprehensive browser-based application that scales for most sizes of mobile devices. Users can access, retrieve and deposit records into DocRecord folders. They can also access and process their workflow tasks. This allows these workers to stay a part of the organization's critical workflow.

DocRecord's Mobile Client allows for PDF annotation and also presents a dashboard of the user's data.



*Easily access and process documents from any mobile device*



*Mobile Client also features a dashboard for customer data*

## Application Extender

Many users need to access ECM records while utilizing another Line-of-Business (LOB) application such as accounting, ERP, or CRM. For these users, DocRecord allows direct access to its records from within the LOB application. It can "screen scrape" key data, such as an invoice number or customer name, from the LOB application and pass it to a DocRecord search, which will return the matching documents. It also supports extracting data from the Windows clipboard, prompting the user, as well as OCR of data from a captured region. No programming is required and set-up is easy.

## Quick Indexing Users

Some organizations process large amounts of non-standard formatted documents that require manual indexing and adding of metadata. These documents – generally correspondences and notes – are usually scanned records. Since they are a non-standard format, automatically extracting metadata is often difficult. The Quick Indexing application allows users to easily add this missing index information and then quickly file into DocRecord.

## Personal Folders

Users can create their own private and secure folders for their personal content and documents. This allows users to access their own content anywhere and any time. This is convenient for all types of content that they may need to remotely access.



## Automated Document Capture, Filing of Documents, and Intelligent Data Extraction

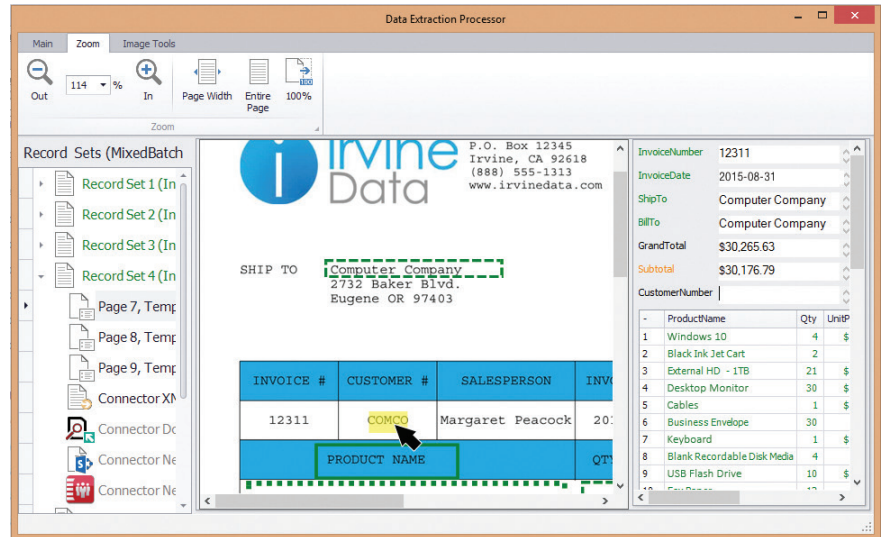
DocRecord provides a powerful and easy-to-use Capture capability that allows documents to be automatically recognized, have data extracted, and filed into its repository.

DocRecord's Capture allows for intelligent and automated line-item data extraction from electronic documents. This allows organizations to eliminate manual keying of critical data into other applications such as accounting and ERP. The extracted data can be automatically compared for a data match to a database and data exceptions can be either approved or corrected by a person reviewing the information.

DocRecord's Capture can automatically have translated the extracted data into 60 languages. It does this through Microsoft Translator, a Microsoft Azure service which the user sets up separately. The benefit of automatically translated data is that it saves time over manually translated data.

DocRecord's Capture also allows for Click Indexing which enables the user to simply "mouse-over" a document's data field and, with a mouse click, add that value to the set of extracted data.

DocRecord provides a number of input methods to Capture including e-mail, bulk document input, MFP and scanners, fax, print queue input, and FTP.



*Simply mouse-over any text on the page and the metadata is automatically set*

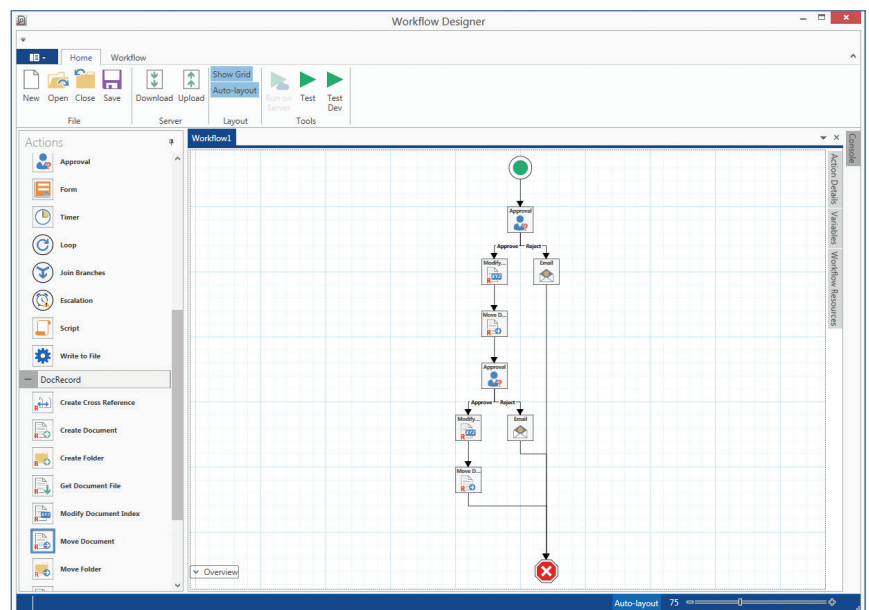
## Workflow for Automated Document & Data Processing and Business Process Automation

Automating and streamlining business processes provide substantial cost savings by eliminating manual tasks and greatly speeds the delivery of data and content to those that need it.

DocRecord's workflow links people and data into automated processes that are easily created for each organization. These processes provide a wide range of functions.

DocRecord's workflows are easily created through its intuitive drag-and-drop and graphical interface. Users simply drag the process task icon to the workspace to create as simple or comprehensive automation as required.

In practice, users participating in workflows have their workflow tasks appear automatically in their workflow inbox within the mobile, desktop, or integrated-MS Office user interface.

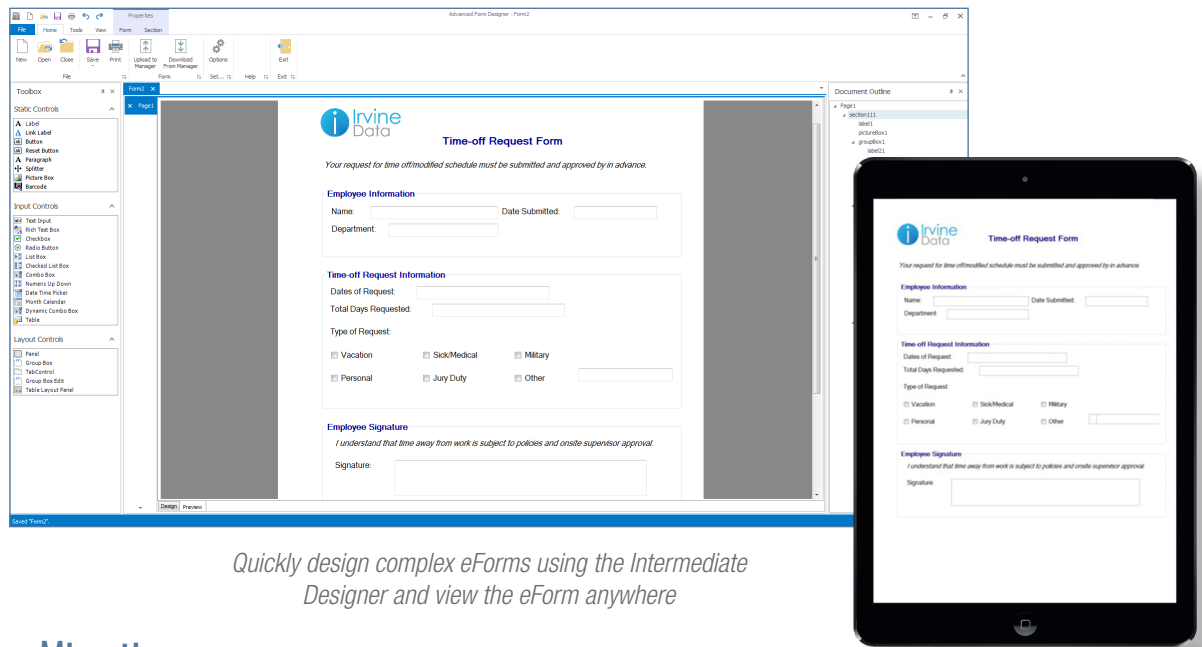


*Easy-to-build Workflow Designer*

## eForms for Data Collection and Processing & Automated Forms Creation

The easy collection of data, such as user information from a web page, is critical to many workflows. With DocRecord eForms capability, organizations can build a wide range of different form types to collect such data from mobile and desktop platforms.

eForms vary widely by purpose, type, complexity, and display platform. DocRecord provides three different and distinct designer interfaces allowing one to easily build a wide range of different types of eForms.



*Quickly design complex eForms using the Intermediate Designer and view the eForm anywhere*

## Network Folder Migration

Since DocRecord is fully integrated with Windows Explorer this allows it to take over an organization's network folder system. It does this by duplicating and then subsuming all the folders and files in the network folder system. Once ingested into DocRecord, your old network folder system can be made inaccessible. Your new network folder system, within DocRecord, allows for all DocRecord's features such as advanced security, check-in and check-out, audit trail, versioning, retention policies, and much more.

## Automatic Document Creation in Workflow

DocRecord's Workflow function also allows for the automated creation of advanced documents. Documents - such as customer notifications, delivery instructions, airway bills, and other items - exist as a customer-created template and then are automatically formed within a workflow process. These variable data documents are created on-the-fly and can utilize conditional database items such as customer information, text items, text sections, graphics and pictures, and can dynamically create charts. These documents can be multi-page and automatically control white sectioning and multi-page flowing.

## Customer & Vendor Portal

Often, both your customers and vendors may need controlled and secure access to their content and records. DocRecord provides this secure and limited access allowing viewing of only the permitted records. It's easy to provide this secure login information and web client link to your customers.

## Third-Party Integration

DocRecord has API-level integration with many third-party line-of-business applications such as Microsoft Dynamics GP, Sage, QuickBooks Enterprise, and others. This integration allows DocRecord to seamlessly function alongside these other applications within DocRecord's Workflow function.

# DocRecord: Extended Capabilities

DocRecord provides additional functionality that extends its all-inclusive capabilities to accommodate organizations' extraordinary requirements.

## Public eForms Module

DocRecord's all-inclusive eForms capabilities are focused upon clients, or concurrent users. Often, an organization may want to place these eForms on their public web site for non-client DocRecord use. These non-clients can include other members of that organization or the public. DocRecord's Public eForms, is available for these types of requirements. Once data is entered into these Public eForms they can then be processed with DocRecord's workflow capability.

## API

With its RESTful web services API, DocRecord's content repository can be accessed or searched with any third-party application.

## Integrated Prism Applications

Prism has other applications, in addition to DocRecord, designed to increase document and data processing efficiencies and lower costs within organizations. These applications are directly integrated with DocRecord and provide a seamless user experience.

### **DocForm** *On-Demand Document Formation*

DocRecord's all-inclusive configuration includes an automatic document creation capability. The output of this feature is limited to DocRecord. An unrestricted version of this capability is available with DocForm. It's designed for organizations that require on-demand, complex, variable-data document creation. With Prism's DocForm, all types of documents can be dynamically and instantly generated from DocRecord and other data sources.

### **Prism WorkPath** *Desktop Workflow and Automated Processing*

Document processing often occurs at the desktop outside of an ECM application. With Prism WorkPath, individuals can process documents at their desktop. Prism WorkPath allows documents to be checked out of DocRecord, processed locally at a desktop, and then checked back into DocRecord. The value of this capability for an organization is that it allows for more flexible document processing alternatives than preset ECM workflow processes.

### **ScanPath** *MFP-based Scanning, Capture and Workflow*

Document processing also often occurs from the multifunction printer (MFP). Prism's application, ScanPath, enables a wide range of automated processing and workflow directly from the MFP. This allows documents to be preprocessed, outside of DocRecord, prior to being filed into DocRecord.

### **Prism Capture** *Advanced Data Capture & Extraction*

DocRecord's all-inclusive configuration includes an advanced and easy-to-use automated filing and capture capability. This capture engine has a dedicated output to DocRecord. However, some organizations will want to expand this capture capability to include other features and destinations including back-end line-of-business (LOB) applications and SharePoint.



15500-C Rockfield Blvd. Irvine, CA 92618 USA  
(949) 855-3100 (949) 855-6341 fax  
www.prismsoftware.com sales@prismsoftware.com



Altman IM Ltd  
www.altmanIM.com