DOCODesknet SBE 2011
DOCODesknet Small Business Edition

Electronic Document Management for small and medium sized enterprises

Built on DOCOsoft Technology
# Index

1. Background ........................................................................................................... 3  
   1.1 Introduction ................................................................................................. 3  
2. DOCOdesknet Small Business Edition 2011 ..................................................... 4  
3. What is DOCOdesknet SBE 2011? ................................................................. 4  
   3.1 Comparing DOCOdesknet SBE / DOCOdesknet Enterprise ................. 5  
4. Infrastructure ....................................................................................................... 6  
5. System Description ............................................................................................. 7  
6. System Overview .................................................................................................. 8  
   6.1 Application Clients ..................................................................................... 8  
   6.2 DOCOsoft Web System ............................................................................. 9  
7. General Specification .......................................................................................... 10  
   7.1 Databases .................................................................................................. 10  
   7.2 Interface ................................................................................................. 10  
   7.3 File standards ............................................................................................ 11  
   7.4 Electronic Cabinet/Folder/Document structure ...................................... 11  
   7.5 Scanning and electronic document importing ........................................ 11  
   7.6 View, Retrieve, Index, and Edit ................................................................. 11  
   7.7 Print, Email, Fax, and Document Forward ............................................... 12  
   7.8 Security .................................................................................................... 12  
   7.9 Auditing and Reporting ........................................................................... 12  
   7.10 Multi-Users with Concurrency ................................................................ 12  
   7.11 Document Formats .................................................................................. 12  
   7.12 Windows Application Full and Lite Clients ........................................... 13  
   7.13 Document Content Searching .................................................................. 13  
   7.14 Web Based clients ............................................................................... 13  
   7.15 OCR and ICR ......................................................................................... 14  
   7.16 Document Forms and Header/Separator Sheets .................................... 14  
   7.17 MS-Office Plug in .................................................................................. 14  
   7.18 MS-Outlook Plug in .............................................................................. 15  
   7.19 Lotus Notes Plug in ............................................................................... 15  
   7.21 Customisable interface to other applications ...................................... 15  
   7.22 System Management Environment ....................................................... 15  
8. Benefits ................................................................................................................. 17  
   8.1 Information Sharing & Distribution ......................................................... 17  
   8.2 Improved Service to Clients ................................................................... 17  
   8.3 Space Saving ............................................................................................ 17  
   8.4 Off-Site Storage ...................................................................................... 17  
   8.5 Time & Money ....................................................................................... 17  
9. Sample User Interface Screens ........................................................................ 18  
Appendix A (DOCOdesknet SBE Summary) ...................................................... 19  
Appendix B (System Architecture) ..................................................................... 20  
Appendix C (Detailed Functionality) ................................................................ 21
1. Background

DOCOsoft Ltd. is an Irish-registered company with its headquarters and software development centre at the Belfield Innovation Park, Dublin, Ireland. It is in the business of developing document management software solutions. It has operated in the UK and Irish markets since 1997.

Its main business alliance partner is Ricoh UK, part of Ricoh Corporation, a major Japanese corporation, and the two companies work together to deliver high quality DMS solutions to the market.

DOCOsoft solutions are used in many blue chip companies, especially in the City of London. One of its advantages in the close integration with existing software systems.

Our DMS systems are used in the UK air traffic control centre, in many major Lloyd’s syndicates, in many financial offices in the city like Merrill Lynch and Barclays bank.

DOCOsoft own the sole rights to its software.

1.1 Introduction

This document will focus on the latest document management product DOCOdsknet SBE 2011 developed specifically for the low to medium enterprise market.

DOCOsoft’s DOCOdsknet SBE system is a robust and powerful Document Management product for the sharing, storing and retrieval of vital corporate information across the enterprise. Users have the option of using application based clients or web based clients for access to the system.

This product will fit in between DOCOsfts low end stand alone and entry level products and its high end MS-SQL based enterprise systems.

DOCOdesknet SBE is for companies that do not have a dedicated IT infrastructure, or who are looking for an entry level document management system with many of the features of much more advanced enterprise solutions for a fraction of the cost.
2. DOCOdesknet Small Business Edition 2011

- Entry Level Enterprise Document Management Solution for Small and Medium Companies
- Microsoft MSDE Professional database
- Multi-User client/server system
- Windows and Web Access
- View, Search, Print, Email, Fax
- Content Searching
- Security
- MS-Office and MS-Outlook integration
- Document and User Audit trails
- OCR and ICR

3. What is DOCOdesknet SBE 2011?

DOCOdesknet SBE is targeted at small and medium enterprises that do not have a dedicated IT infrastructure, or a company who is looking for an entry level document management system with many of the features of much more advanced enterprise solutions for a fraction of the cost.

It uses the new Microsoft database called Microsoft Data Engine (MSDE). This database is in the new strategic direction for Microsoft, and is completely compatible with the SQL Server Version 7.0 code base, enabling customers to have applications that scale from a PC running the Windows 95 operating system to multiprocessor clusters running Windows NT Server, Enterprise Edition. Microsoft allow the MSDE database to be distributed free of charge.

Companies can easily upgrade at a later stage to the DOCOdesknet and DOCOtreasury enterprise series. See www.docosoft.com for more details.

DOCOdesknet SBE can be used in departments where there is a limited number of concurrent users (around 10 is recommended).
3.1 Comparing DOCOdesknet SBE / DOCOdesknet Enterprise.

**DOCOdesknet SBE**

**Pros**

1. Microsoft MSDE Database free of charge
2. Document Server can be any Microsoft operating system
3. Suits companies with no dedicated IT back office
4. Less expensive solution

**Cons**

1. Database size limited to 2GB
2. Up to 5 concurrent users recommended, with up to 50 named users
3. Performance will be an issue for large data volume and number of users

Summary: Use this product if you are a department that wants a cost effective professional document management system, with limited users, and limited data volume, and have no dedicated IT back office infrastructure.

**DOCOdesknet Enterprise**

**Pros**

1. No limit on the database size
2. No limit on the number of users
3. MS-SQL database includes many backend data maintenance tools
4. Faster and more responsive for large document volumes
5. Better handling of large documents with streaming and on demand caching

**Cons**

1. Needs MS-SQL database
2. Needs a Windows Server operating system
3. More expensive solution

Summary: Use this product if you are a department that has an IT back office infrastructure, and has many users and large document volume, and are concerned with system performance.
4. Infrastructure

Docosoft’s software is built around Microsoft’s products. They are designed to run on Microsoft Operating Systems, utilize Microsoft security measures and web operations are performed through Internet Explorer.

**Standard Workstation Specification**
IBM compatible computer with Intel Pentium 3 1.0 GHZ or higher
256 MB RAM or higher
Windows XP, Window 2000 Pro, Windows NT, Windows 98, 95 supported
IE 5.0 or later

**LAN**
The LAN can be a 10 or 100 M bit Ethernet.

**WAN**
Standard WAN specification

**Server**
Microsoft 2000 Server recommended  (Microsoft NT Server 4.0, Server 2000, Server 2003, Microsoft XP, Windows 7 supported)
MS-IIS 6 recommended  (MS-IIS 4.0 or higher supported)

**Database**
Microsoft Data Engine 2000 (MSDE)
5. System Description

All personnel can store their documents direct in a central database. When data is in the database the rest of the organization can have access to this data dependent on their user profiles.

Data can be entered into the system in several ways:

**Online:** The PC is connected to the local network; the database is updated immediately when a document is saved.

**Remote:** The PC is connected to the network via a modem line, the database is updated immediately when a document is saved, or it can be updated when convenient.

**Off-line:** It is possible to download document copies on to a portable PC, edit these, and then copy the new version back into the document management system when the PC is on the network again.
6. System Overview

Access to DOCOsft’s DMS system is through a standard application client for LAN/WAN based access or through the web client for LAN/WAN/INTERNET based access.

6.1 Application Clients
The standard client application is installed on the user’s desktop. Written in C++ these clients are typically used internally within a company’s organization for LAN/WAN based access to the DMS server. These clients provide the fastest access for searching, viewing and updating the database.

Typical Application Client Screen
6. 2 DOCOsoft Web System

DOCOsoft’s web system runs on IIS and interfaces with all of DOCOsoft’s existing products. Clients using Internet Explorer 5 can log into this web-application via two methods - intranet or internet.

Client’s can choose between a standard thin HTML only clients or rich ActiveX control clients.

The system is based on normal 3-tier architecture. We use MS-SQL database on the backend, our business components (API’s) as middle tier and connect with clients through IE. The system is written using ASP, ATL Active X Components and DHTML.

Documents can be viewed as HTML, or natively using DOCOsoft’s ActiveX controls.

Typical Web Client Screen
7. General Specification

The user program(s) shall be executed on the local PC, but all data is stored centrally on the Windows NT server (except when the user is off line).

The system will in general run in the described infrastructure without further investments in hardware or standard software.

### 7.1 Databases

The program can use Microsoft MSDE on any Windows operating system, Microsoft SQL server 6.5 or higher on Windows NT Server or Windows 2000 server.

A new Logical database will be created, and all records will be stored in this database.

DOCOSoft data access is built on top of ADO so it can easily be tailored to connect to other Databases such as ORACLE. As Docosoft provides a totally scalable system load balancing and database clustering can be added as the system grows.

Advantages of MSDE database over the Access (JET) database

- More reliability
- Better security
- Handling of simultaneous users
- Business critical architecture
- Scalable to MS-SQL

### 7.2 Interface

The system has a windows interface or a web interface. The System is totally integrated with IIS 4.0 or higher.

All Documents can be accessed via a URL.

The system can handle E-mails, Faxes, all office documents and all types of scanned documents.
7.3 File standards
The system is capable of handling all normal file standards e.g. doc, jpg, tif, pdf, txt) Up to 280 different file formats are supported. A complete list is available upon request.

7.4 Electronic Cabinet/Folder/Document structure
Documents are easily stored and organized into ‘tree’ structured cabinets and folders. DOCOsoft's intuitive GUI (Graphical User Interface) makes for simple viewing and makes the Drag & Drop feature for movement and copying of documents a cinch.

7.5 Scanning and electronic document importing
Full support for ISIS and TWAIN scanner drivers
Preview scan images, multi-page TIFF support
De-skew, de-speckle, auto-rotate, duplex support
Scan directly to TIFF or PDF
Import files directly from hard disk, network, CD-ROM, or any external media
Drag & drop and OLE supported

Import virtually any industry standard file type such as
- images
- graphics files
- CAD files
- spreadsheet files
- word processor files
- presentation files
- database files
- compressed files

7.6 View, Retrieve, Index, and Edit

- view documents immediately as thumbnails, icons, original & list format
- fast viewing of complex CAD formats
- simple zoom and scroll feature
- view all the properties of each document

Add any type of property to a document as it is imported or later, after it is in the system, then retrieve the document based on these properties. Customized property settings are also available.
7.7 Print, Email, Fax, and Document Forward

With DOCOsoft's products, documents can be rapidly exchanged by print, email, fax or just forwarding the document across the network. These are special print, email and fax folders that you simply drop the document into to send it immediately, or queue for later. Email* any document, or convert the document to a bitmap file and send it. *Email uses MAPI connectivity

7.8 Security

DOCOsoft provides powerful information access control which augments your existing network security system. The security model is integrated with Windows NT and there is a password protected user logon. DOCOsoft provides both folder and document level security. Permissions such as READ/WRITE/COPY/DELETE/EXECUTE can be applied to individual documents within the system. The security is user and group based.

7.9 Auditing and Reporting

There are audit trails for users and documents in the system, which can be used for compliance and security purposes. Management reports can be generated from these trails.

7.10 Multi-Users with Concurrency

DOCOsoft's DOCOdesknet provides a multi user environment where many users can be connected to the server at any one time. Documents can be easily shared between users and different security levels provide a safe environment.

7.11 Document Formats

Each DOCOsoft product enables you to work with more than 280 Windows, DOS, Macintosh and Internet formats without the native application. These include formats from Microsoft Word, Excel, PowerPoint, Lotus, WordPro, Corel, AutoCAD DWG, DXF, IGS or even web pages in HTML format. The original application is not required to view any document.
7.12 Windows Application Full and Lite Clients

The standard client application is installed on the user’s desktop. Written in C++ these clients are typically used internally within a company’s organization for LAN/WAN based access to the DMS server. These clients provide the fastest access for searching, viewing and updating the database. There are Full access read/write clients and Lite client that are read only. Lite clients can view, search, print, email, etc. but cannot edit or delete documents.

7.13 Document Content Searching

DOCOsoft provides the ability to search for a document based on a text search. The resultant document or documents can be opened with the search word highlighted. The DOCOFTS control performs full text search on the following document types: TIFF (after OCR), Word (.doc), HTML (.html, .htm), Excel (.xls), PowerPoint (.ppt), PDF (.pdf), text (.txt) and Configuration Settings file (.ini). Docosoft license the Verity Full Text Search engine for this module. See www.verity.com for more information.

7.14 Web Based clients

Built on 3 tier type of architecture DOCOsoft web system utilizes its robust set of API’s with ASP and its leading edge compression technologies to deliver a high speed, reliable and easily maintainable system.

User Customisable Web Screens

DOCOsoft provides various sample web screens to the end user so that they can have a graphical user interface that suits their business. It is very simple for users to add their own screens for their own interfaces.

Accessing the Data

Access to the DOCO DMS from the web system is provided through DOCOsoft set of API. As this API is open it can be easily tailored to suit customers needs.

Presenting Data to the User

DOCOsoft provides numerous options to the user for viewing of its information across the web. Among those are

Choice between Rich ActiveX based Clients or HTML only type clients
• The ActiveX based clients provide functionality similar to that of the application based clients and as they are built on the DOCOsoft API can easily be customized.

• HTML only clients require no ActiveX download from the server and are thus suited for viewing information from devices such as PDA’s

Advanced compression and streaming technology for the delivery of large documents across the web to the client (see high speed viewing of large documents)

HTML Export Tool to convert all documents to HTML compatible formats.

7.15 OCR and ICR

With DOCOsoft’s products you can easily turn any printed pages, faxes, photocopies or articles into electronic documents you can use within seconds. The Scansoft Omnipage and Textbridge optical character recognition engines are embedded in the system which allows batch and region OCR. Recognized files may be stored in MS-Office, Lotus, HTML or TXT formats as well as PDF. See www.scansoft.com for more information. Intelligent Character recognition for handwriting and barcode interpretation is also available.

7.16 Document Forms and Header/Separator Sheets

The system supports document forms where users can generate template forms and these forms can be used for extracting information from scanned images such as invoice numbers automatically from invoice documents. The extracted data is used to index the document, where it can be easily retrieved at a later stage. Header sheets templates can also be generated which contain information to automatically store documents in scan feeders. Separator sheets can be used to automatically separate documents in scan feeders.

7.17 MS-Office Plug in

DOCOsoft provides powerful office add-ins which allows seamless integration of the Docosoft DMS system and Office. From a Docosoft DMS menu within the office application files can be directly added to the DMS. Administrators have the option of disabling normal Office Save to ensure documents are always added to the DMS. Presently Add-ins are available for Word/Excel/Power point.
7.18 MS-Outlook Plug in

This plug in will allow users to archive their emails directly into the DOCOsoft DMS. Attachments are also included. Everything is automatic and the emails are indexing in the DMS with their original keywords such as sender, to, cc, date, etc.

7.19 Lotus Notes Plug in

This plug in will allow Notes users to have a seamless link to the document management system. There is no need to leave the Notes application to view, search and print documents. It is also possible to add documents directly from the Notes environment into the DMS, including emails with attachments.

7.21 Customisable interface to other applications

DOCOsoft allows customization of its products using the following

- Fully Documented ATL based Active X controls
- Through DDE Communication

7.22 System Management Environment

The System manager can set up user profiles with restrictions to the level so he only sees documents that he is responsible for.

System Administration
The system administration can be done from easy to use tools.

System manager environment
The System manager can set up user profiles with restrictions to the level so he only sees documents that he is responsible for.

Database administration
The database administration can be done from easy to use tools and also from the Database administration program, MS SQL admin for Microsoft SQL server.

Backup & Restore
With the system there is a full backup and restore solution, based on standard backup strategy. To facilitate disaster recovery backups can be written to CD or DVD for off site storage.

**Service & Maintenance**

DOCOsoft provides a service agreement covering full functionality.

The service contract contains the following:

- Telephone support.
- Software Updates.
- On site service support at an extra cost
8. Benefits

This section aims to outlines some, if not all, of the advantages in implementing an EDMS. Nowadays, 80% - 90% of corporate information is in documents.

8.1 Information Sharing & Distribution
This becomes much cheaper, quicker, easier and more efficient, since many people can view the same document simultaneously without having to make multiple copies of paper documents.

8.2 Improved Service to Clients
This focuses on improving the speed of service to clients over that of their competitors. This is especially evident when talking to companies who still use a Microfilm based system. This is very slow to create documents – typically about a 2-week turn around time to turn paper into Microfilm. Speed of viewing of documents is a very slow manual viewing system. It is also very expensive and very old-fashioned.

8.3 Space Saving
More space becomes available in the office when documents are converted to electronic format. Companies can save money on storage costs through increased office space by implementing EDM solutions. Companies can afford not to move offices in some cases

8.4 Off-Site Storage
Documents can be stored off-site for much lower storage costs, or destroyed altogether. In most cases when documents are stored off-site, or even in the same building in some kind of archive area, the following scenario is seen:

Have to find the document.

Have to return to working area to perform any actions.

Return the document to original location when finished. If it is returned to the wrong location, it may never be found again.

There may be only one copy of the original document. This means there will be degradation of this document each time it is processed or copied. When documents are retrieved, they often have to be sent somewhere. This usually means by fax or post. These two methods of delivery are slow and unreliable.

8.5 Time & Money
Obviously, this is where the biggest savings are made. Listed here are a few statistics that outline how time and money can be saved. Documents can claim:

40% - 60% of office workers time
20% - 45% of labour costs
12% - 15% of corporate revenues
9. Sample User Interface Screens

Content Search Screen example

Document Audit Screen example

User Manager Tool Screen
Appendix A (DOCOdesknet SBE Summary)

Basic Features >>

- Scanning and electronic document importing
- View, Retrieve, Index and Edit
- Print, Email, Fax and Document Forward
- Electronic Cabinet/Folder/Document structure
- Multi-Users with concurrency
- Microsoft MSDE Database (No cost)
- Security
- Auditing and Reporting
- Document Formats
- Windows Full and Lite clients
- High Speed Viewing of Large Documents

Options >>

- Document Web Server
- Document Content Searching
- OCR/ICR Document Forms and Header/Separator sheets
- PDF scanning
- Microsoft Office and Outlook Plug ins
- Lotus Notes Plug in
- DVD/CD output
- Customisable Interface to other applications
Appendix B (System Architecture)

DOCOsoft Enterprise DMS Architecture
## Appendix C (Detailed Functionality)

<table>
<thead>
<tr>
<th>Document Management</th>
<th>DOCOsoft 2011</th>
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<tbody>
<tr>
<td>Target user</td>
<td>Small and medium enterprises. (up to about 50 users, 10 concurrent)</td>
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<tr>
<td>Products</td>
<td>DOCOdesknet SBE 2011</td>
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<tr>
<td></td>
<td>Server:</td>
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<tr>
<td></td>
<td>Full Client:</td>
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<td></td>
<td>Lite Client:</td>
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<td>Web Client:</td>
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<tr>
<td>Environment</td>
<td>Windows95 / 98/ME</td>
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<tr>
<td></td>
<td>WindowsNT4.0 / 2000 / 2003, XP</td>
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<tr>
<td>Structure</td>
<td>PC</td>
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<td></td>
<td>IBM PC/AT compatible</td>
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<td></td>
<td>scanner</td>
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<td>TWAIN and ISIS</td>
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<td>printer</td>
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<td>Windows support printer</td>
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<tr>
<td>Memory</td>
<td>media</td>
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<td></td>
<td>HD, MO, DVD, CD</td>
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<td></td>
<td>saved file format</td>
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<td></td>
<td>Image: BMP, CALS, DCOM, KODAK, ZSOFT, ADOBE PHOTOSHOT, TARGA, POSTSCRIPT, SUN, WORDPERFECT, MAC, GEM IMAGE, PNG, TIFF, FAX, WINFAX, JPEG, ADOBE PDF</td>
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<tr>
<td>Structure</td>
<td>Cabinet / folder / document</td>
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<td></td>
<td>several pages per document</td>
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<tr>
<td>Available Options</td>
<td>Full Text Search</td>
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<td></td>
<td>Retrieval of documents based on the textual content</td>
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<td></td>
<td>Uses Verity Engine <a href="http://www.verity.com">www.verity.com</a></td>
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<td></td>
<td>Scan to PDF</td>
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<td>Save scanned images to Adobe Acrobat format</td>
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<td></td>
<td>BARCODE option (BARCODE)</td>
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<td></td>
<td>OCR FORMS</td>
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<td></td>
<td>Automatically set properties from a scanned region on a document.</td>
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<td></td>
<td>Virtual ReScan</td>
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<td></td>
<td>Improves Quality of scanned Image</td>
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<td></td>
<td>ICR</td>
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<td></td>
<td>Recognition of handwritten documents.</td>
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<td></td>
<td>MS OFFICE ADD-INS</td>
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<td></td>
<td>Provides an Interface from MS Office Applications to the DOCOsoft System.</td>
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<tr>
<td>Input</td>
<td>Scanning</td>
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<td></td>
<td>Directory/File</td>
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<td>Auto file Import</td>
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<td>Web</td>
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<td></td>
<td>Interface to Ricoh Scan Router</td>
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<tr>
<td>Retrieval</td>
<td>Full Text Search</td>
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<td></td>
<td>With multiple criteria, AND/OR/EQUALS/NOTEQUALS/SOUNDSLIKE</td>
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<tr>
<td>Property Search</td>
<td>With multiple criteria, AND/OR/EQUALS/NOTEQUALS</td>
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<td></td>
<td>“save” Search results</td>
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<tr>
<td></td>
<td>Low Network Impact on searching</td>
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<tr>
<td>Target keeping division for retrieval</td>
<td>All cabinet, selected cabinet</td>
</tr>
</tbody>
</table>

| Display | Individual viewer | Seamless Viewer.  
(Support for over 300 formats without need of native application on system. List of supported formats available on request.) Extremely high speed document viewing. Thumbnails. |
<table>
<thead>
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<tbody>
<tr>
<td></td>
<td>Handling of Document</td>
<td>document: create, delete, copy, move, create shot-cut file(section): add, delete, exchange, edit</td>
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<tr>
<td></td>
<td>procedure after edit file</td>
<td>Check in modified file</td>
</tr>
<tr>
<td></td>
<td>Import / Export</td>
<td>Ok (both document and index)</td>
</tr>
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<tr>
<th>Printing</th>
<th>kind of printing</th>
<th>Document/View/Page Range</th>
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<tr>
<td></td>
<td>Print various size</td>
<td>Original, Fit</td>
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<td></td>
<td>Preview Available</td>
<td>Yes</td>
</tr>
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</table>

| Scanning | Batch Scanning  
Multi-page scanning  
On Line scanning  
Off Line scanning  
Browser scanning  
Multiple PC scanning  
Automatic indexing  
Manual indexing  
OCR/ICR/Barcode ready  
Auto Deskew, Despecke and other cleanup operations |
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<tbody>
<tr>
<td>Revision Control</td>
<td>Not available here (DOCOtreasury only)</td>
</tr>
<tr>
<td>Check In/Out</td>
<td>Not available here (DOCOtreasury only)</td>
</tr>
<tr>
<td>Audit</td>
<td>Document and User Audit trail</td>
</tr>
</tbody>
</table>
| Web | Intranet option.  
Internet option.  
Browser friendly (fast access) |
| Compression | During Scanning Process as option  
Documents compressed (DOCOtreasury only)  
Streaming available for transmission over web |
| Security | User Logon with password protection  
Each user has control over his/her own documents, Cabinets and Folders  
Multi User security Levels  
Usage Audit Trail |
<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
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<tbody>
<tr>
<td>Functional Security</td>
<td>NT Security Integration</td>
</tr>
<tr>
<td>Backup/Restore</td>
<td>Full functionality available, CD/DVD backup</td>
</tr>
<tr>
<td>Usability</td>
<td>Intuitive to use.</td>
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<tr>
<td></td>
<td>Seamless operations.</td>
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<tr>
<td></td>
<td>Advanced mouse functionality (from CAD background).</td>
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<td></td>
<td>Standard functionality throughout.</td>
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<tr>
<td>XML</td>
<td>Interface available for output and input</td>
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<td>Mail</td>
<td>Send mail (MAPI)</td>
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<td></td>
<td>Integration of MS Outlook with DM System</td>
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<td></td>
<td>Email archive with MS-Outlook, Lotus Notes</td>
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<tr>
<td>FAX</td>
<td>printer driver</td>
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<tr>
<td>Workflow and Document Lifecycle Management</td>
<td>Not available here (DOCOtreasury only)</td>
</tr>
<tr>
<td>Network</td>
<td>LAN/WAN/Web</td>
</tr>
<tr>
<td>OCR</td>
<td>Full OCR functionality (Interactive OCR)</td>
</tr>
<tr>
<td></td>
<td>Forms with OCR</td>
</tr>
<tr>
<td></td>
<td>Region OCR</td>
</tr>
<tr>
<td></td>
<td>Header sheet processing</td>
</tr>
<tr>
<td></td>
<td>Multi-Language support</td>
</tr>
<tr>
<td></td>
<td>Batch OCR</td>
</tr>
<tr>
<td></td>
<td>Save to PDF, DOC, XLS, WRI, EPS, LWP, 123, HTM, TXT</td>
</tr>
<tr>
<td></td>
<td>Uses Scansoft Engine, <a href="http://www.scansoft.com">www.scansoft.com</a></td>
</tr>
<tr>
<td>DB engine</td>
<td>Microsoft Data Engine (MSDE)</td>
</tr>
<tr>
<td>Administration</td>
<td>Specialised administration tools</td>
</tr>
<tr>
<td></td>
<td>Based on MS-SQL</td>
</tr>
<tr>
<td></td>
<td>Easy to use.</td>
</tr>
<tr>
<td></td>
<td>Password protected</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Customizing</td>
<td>Full API (activeX / DDE) &amp; customer specify requirements</td>
</tr>
<tr>
<td>Extendibility</td>
<td>Easily Integrated with any product using the API</td>
</tr>
<tr>
<td>Basic technology</td>
<td>C++ Active-X control C++, Internet ASP</td>
</tr>
<tr>
<td>Sales</td>
<td>U.K, JAPAN, IRELAND</td>
</tr>
<tr>
<td>Support</td>
<td>Installation</td>
</tr>
<tr>
<td></td>
<td>Support Contract</td>
</tr>
<tr>
<td></td>
<td>Hot LINE</td>
</tr>
<tr>
<td>Documentation</td>
<td>On-Line and Paper documentation</td>
</tr>
</tbody>
</table>

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