

Document Manager 2.6 Enterprise Edition.

Summary

Document Manager was first launched in April 2000 and has evolved over the years adding new functionality and ease of use features with an international installed base of over 500 organisations ranging in size from 5 users to over 1000.

Many of those organisations are still running 'old' versions of the software under the policy of "if it ain't broke don't fix it" but may be missing out on some useful functionality that will improve their productivity.

The purpose of this document is therefore to summarise some of the new product features that have been introduced since the older versions, dating back to 1.6. If you have a particular question about any of the new features, or whether some particular functionality you require is in the product now, please contact our helpdesk and they will either answer your query or arrange for a pre-sales engineer to contact you.

This document is not an exhaustive list of new functionality but focuses on the 'headline' items.

Upgrades

If you are paying the annual maintenance and support fees you are entitled to upgrade to the latest version of software. Some new features / modules are optional and may incur a small upgrade fee.

Depending upon the version you are upgrading from you may require some assistance from our Professional Services team, so we advise you to contact us for advice.

Microsoft Windows 7 Certified

Document Manager 2.6 has been tested and certified compatible with Microsoft Windows 7 on both 32 bit and 64 bit platforms.



Document Manager 2.6 is also supported for Microsoft Windows Vista and Windows XP.

Features Introduced with 2.6

- Active Directory integration
- Enhanced Full Text Search
- OCR Assisted Indexing
- Enhanced Screen Scrape Integration
- Print Driver (Print and Store from any application)
- New MS.Office Addin (Open/Save from Office 2003 to 2010 Applications)
- Filing Assistant (Monitor folder for new files and Save)
- Email 'Send' adds Outlook signatures to emails
- Speed improvements in searching / displaying result lists

Features Introduced with 2.4

- MS.Office 2007 Look and Feel (Ribbon Bar)
- Default options for document checkout

Features Introduced with 2.3

- Automatic Login using Windows login name
- Integration with AutoVue (Oracle document preview product)

Features Introduced with 2.2

- Workflow Users counted and licensed separately
- Automatic configurable session timeouts after inactivity
- UTC time zone for auditing (consistent across time zones)
- Import Service – Server side XML based service for importing documents

Features Introduced with 2.1

- Scanning / Viewing of documents as PDF
- API Enhancements
- Document Encryption
- Common Fields (fields shared between Drawers)
- Major and Minor versions in Version Control
- Cross Drawer Screen Scrapes
- Concurrent Licensing option
- Standalone CD Viewer / Export option
- Domains (lists) can reference external databases

Active Directory Integration

For larger organisations with more than just a dozen or so users it can be quite an overhead to initially configure and then maintain the lists of users in Document Manager.

With 2.6 we have the ability to integrate with your Active Directory to import selected groups and their members. The group permissions must still be defined in Document Manager but this is a one-off exercise and then membership of the groups can be managed in Active Directory.

It is still possible to have non Active Directory users so you can (for example) have external users defined in Document Manager.

Active Directory also brings the option of Single Sign On making the process of logging on much easier for your users.

For existing installations there is a synchronisation process that allows Active Directory users to be 'mapped' to existing Document Manager users, thereby preserving the audit records and permissions and preferences etc that already exist.

Full Text Search

Searching for documents using structured fields like 'Supplier Name' or 'Invoice number' provides a quick and efficient way of locating specific documents that you know you should have, but what if you want to find documents based on criteria that aren't in the structured indexes?

Using the new full text search capability you can search on document content as well, so for example if you are writing a proposal for something to do with 'widgets' you can now search for existing documents that contain 'widgets' AND 'proposal'. This will list the relevant documents which you can then review with the key words highlighted.

Unlike some other document management products we can combine content with structured index searches, so we can search for things like 'Customer Name = ACME' and Content contains 'widgets AND proposal' so we can limit the documents to those where we know the Customer Name etc...

The searching works for both application documents like Microsoft Word and scanned images which are OCR'd to provide the searchable text. It will even accommodate OCR errors to a certain degree.

OCR Assisted Indexing

Different people have different names for this feature, like 'OCR on the Fly' or 'Single Click Entry' but essentially the functionality is the same, it's the ability to OCR a part of the document to populate the structure index fields, like 'Invoice Number'.

Currently when a document is scanned the user has to enter the index information by looking on the document and then typing the information into each field, like Invoice Number, Date, Value etc...

With OCR Assisted Indexing the user simply drags a rectangle around the information on the image and the area inside the rectangle is OCR'd and entered into the index field. The next index field is then selected and the process can repeat, making data entry much quicker and simpler.

This kind of technology is usually found in advanced data capture products with a premium price tag so inclusion in our business edition product is a major benefit.

Obviously this relies on OCR so some documents will perform better than others and it will not OCR hand writing but most documents will give good results, and where they don't the user can still manually key the information.

OCR Assisted Screen Scrape

Screen scraping is a simple way to document enable other applications by reading their window contents and then searching for related documents. For example looking at a purchase transaction in your accounts software, press a hotkey and view the related documents in Document Manager.

Screen scraping would work for most (about 80%) of windows forms applications, but not web applications, java applications or applications running in environments like Citrix or Terminal Services.

With 2.6 we have now added another method of reading the screen contents using OCR which now allows us to screen scrape such applications where we could not in the past. Key zones on the application window are captured, read and mapped to fields in Document Manager.

Configuring the screen scrape takes just a few minutes and requires no development skills, we will provide a mini tutorial to assist users with the configuration, and once configured it's as simple as pressing a function key.

This makes Document Manager one of the most integration friendly packages available.

Print Driver

The Print Driver is a windows printer that can be selected as a printer from any application that has a print option. When a document is printed it will create an image of that document (TIF or PDF) and pop-up a profiling window allowing you to index the document in Document Manager.

The print driver can then forward the printed file onto another physical printer so a hard copy is still produced.

The print driver has an API allowing some customisation and automation of its behaviour, for example automatically indexing the images based on the file name of the printed file. We have done this for some Accounting software to automatically file Sales Orders, Invoices etc...

Print Driver is an optional module so there is a small charge associated.

MS Office Addin

Microsoft are always finding ways to do things differently and MS Office is no exception, particularly with the introduction of MS Office 2007 with its XML based file types and new look and feel.

So we have written a new Office Addin with options for Office 2010 and Office 2003 that allows documents to be saved directly to Document Manager from Word, Excel, Powerpoint and Outlook.

In addition we have enhanced the Outlook functionality to allow attachments to emails to be saved separately or as part of the message.

Filing Assistant

Filing Assistant is a small utility that runs in the Windows System Tray and monitors a folder for any new files, usually a sub-folder of MyDocuments. When a new document appears in this folder it will pop-up and ask the user to profile the document for Document Manager and then move the document into the Document Manager repository.

This allows any application that has a 'File / Save As' menu option to achieve a relatively seamless integration with Document Manager. It can also allow integration with applications that support drag-drop of files into folders, like Software Fax solutions.

Windows 7

Again Microsoft are finding ways to keep us application developers on our toes and Windows 7 is no exception. You will be pleased to know that we have Document Manager working with Windows 7 already.

Email Signatures

This may sound like a minor feature but is actually very important. Previously when sending a document as an attachment to an email from Document Manager any pre-configured email signature that you had configured in MS-Outlook was not appended to the message.

This was not a failing of Document Manager but a result of the MAPI functionality provided by Outlook, and was the same for any application (including Windows Explorer) that used MAPI to send emails.

In 2.6 we now detect the presence of MS-Outlook and use it directly instead of using MAPI and this allows us to utilise the signature feature, so now all your emails can be sent with the required company disclaimer and signature.

Speed Improvements

As products get richer in functionality with more sophisticated user interfaces it is common that a price is paid in performance. We found this to be the case when we upgraded our user interface to the Office 2007 style in 2.4 so we spent some time seeing how we could re-optimize the performance of searches and listing results.

The end result is good, and we are now faster than we were with our simpler user interfaces in the days of version 1.6. Opening the Explorer view and listing over 2000 folders now takes just a couple of seconds!

The Future

There is always new development under way at Document Logistix and we have a roadmap of new products and features available for 2011 and beyond including:

- Fully functional Web application built on Silverlight 4
 - Same look and feel as the 2.6 desktop product
 - Similar performance to the 2.6 desktop product
 - Almost same functionality as the 2.6 desktop product
 - No deployment issues – multiple web browser support
- Sophisticated Batch Scan with OCR of complex documents including Invoices
 - Automatic capture of Invoice data and integration into ERP systems
- Accounts Payable Invoice Approval Workflow
 - Web Based coding and approval of AP Invoices

These new products are available now, if you are interested please contact us.