DocRecord

ENTERPRISE DOCUMENT & CONTENT MANAGEMENT

AUTOMATICALLY RECOGNIZE, OCR, INDEX, AND FILE YOUR DOCUMENTS

AUTOMATED DOCUMENT PROCESSING & WORKFLOW

SEARCH AND ACCESS DOCUMENTS FROM ANYWHERE

KONICA MINOLTA

COUNT ON
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DocRecord™

DOCRECORD IS AN ENTERPRISE DOCUMENT AND CONTENT MANAGEMENT SYSTEM DESIGNED FOR MIDSIZE-TO-SMALL ORGANIZATIONS FROM 2,000 TO 15 EMPLOYEES, PROVIDING:

- Automated document recognition, indexing and filing

- Automated document processing of single or batch-scanned documents

- Document-centric and process-centric workflows, and

- Instant retrieval of electronic documents
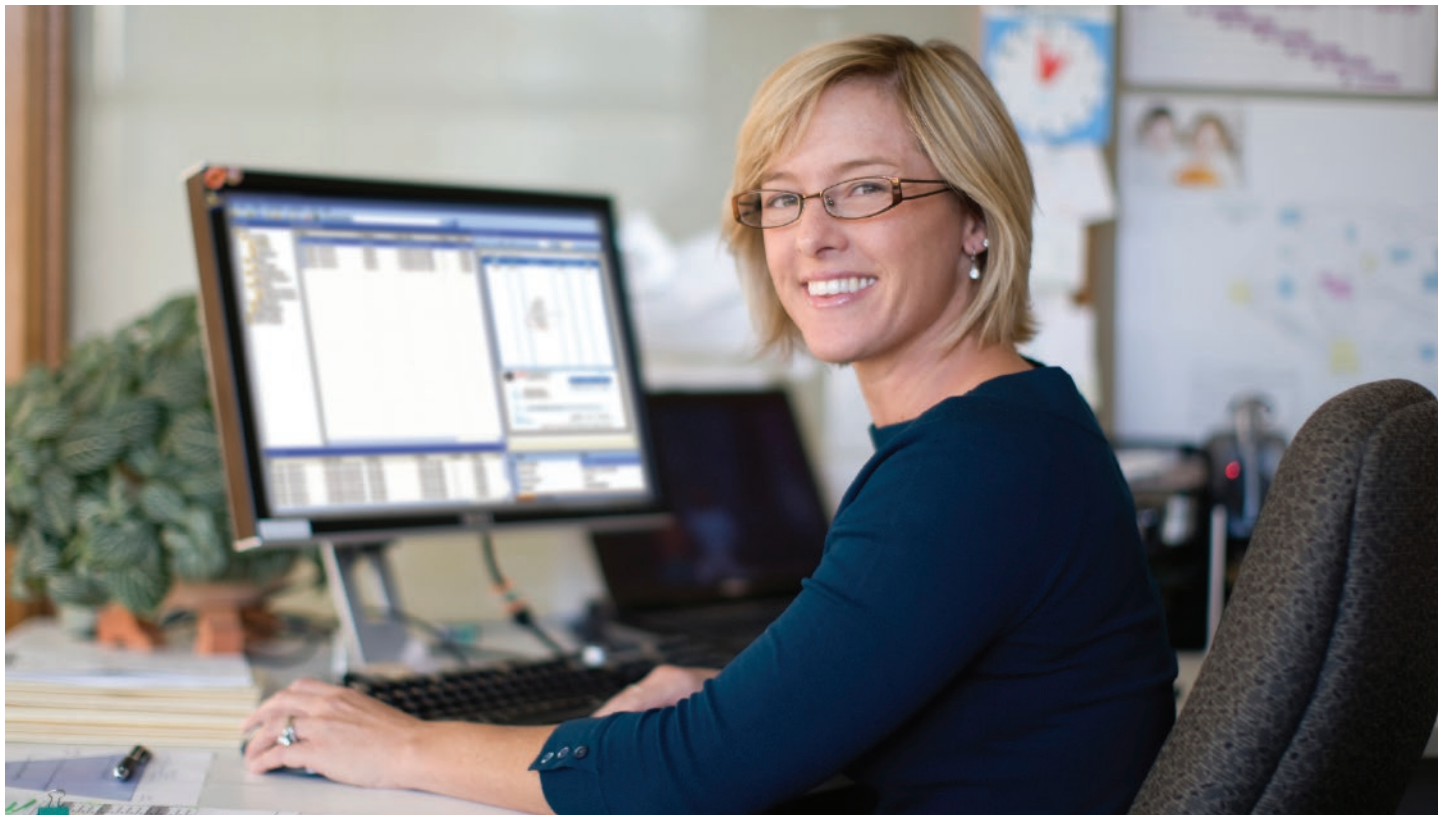
DocRecord provides organizations an efficient and convenient way of processing and storing their electronic documents and other valuable content. While both easy to install and use, it provides a wide range of advanced features required by organizations that require security, worker collaboration, processing automation, and workflow.

INCREASING EFFICIENCIES AND LOWERING COSTS IS EASY

- Automated document recognition & filing

- Document Processing Automation

- Electronic Document Workflow

- Automated Data Extraction & Entry on Key Documents

- Search & Retrieve Important Documents Any Time from Anywhere

- Easily Process Batches of Documents

DOCRECORD KEY FEATURES

- Automated document naming, routing, indexing & filing

- Access documents through either a Desktop Client or Web Client

- Automated batch splitting and indexing of mixed document types

- Microsoft Office one-button integration

- Access documents from Windows, Mac or Linux OS

- Microsoft SQL Server or Oracle database compatibility

DocRecord provides a wide range of powerful capabilities and features that enable your organization to easily and substantially increase its efficiencies and decrease its costs.

Instant Access to All Your Documents

We all depend on instant access to data and records in our personal life; our businesses should have the same instant access. With DocRecord, your business can easily have both automatic filing and instant records access.

DocRecord's automated document filing eliminates the time, effort, and errors associated with manual processing of paper. DocRecord is able to automatically file all single or batch scanned documents as well as those arriving from other methods such as email, faxes, third-party applications, and more. Once filed, DocRecord provides your employees with instant access to these records from either their desktop or any browser-enabled device. This means they can search for records from any place and at any time that's required.

Instant access means lower costs and greater efficiencies…

Significantly & Quickly Improve Document Processing

Many documents, such as those in accounting, must be processed after they've been received and prior to filing them. DocRecord can automate and significantly improve these document processes by routing them to others, extracting key data for presentment and processing, allow for annotation and comment, provide notifications to others, and file.

Key data – such as a customer name, number, invoice amount, and date – can be automatically extracted from a document and presented to a user for verification. Once verified the extracted data can be automatically sent to another line-of-business applications, such as accounting or ERP, and the document can be automatically filed into DocRecord for future reference.

A significantly improved method for processing documents means lower costs and greater efficiencies…

Easily Automate Complex and Manual Document Workflows

Often, documents have complex and manual workflows that require multiple copy distribution, multiple approvals, reviews and comments, processing, and then filing once completed. Different than usual straight-forward document processing, the complexity of these workflows varies greatly by organization.

DocRecord anticipates these complexities and provides an intuitive electronic method of creating easy-to-use workflows that are effective and greatly reduce time and efforts. DocRecord provides you with the status of documents and where it is within its workflow process.
Automated document workflows that eliminate manual processing means lower costs and greater efficiencies…

EASY TO GET DOCUMENTS INTO AND ORGANIZED BY DOCRECORD

DocRecord provides a wide range of simple and automated ways of getting your records, content, and data captured and organized in a manner that makes sense for your organization.

Document & Content Capture

DocRecord easily captures both documents and other content, automatically or manually, from across your organization from a wide variety of sources including:

Automated Document Recognition, Indexing & Filing

DocRecord, through its Automation Server, can receive single and batch documents, OCR (optical character recognition) these documents, recognize the type of document, automatically assign the appropriate indexing information, and automatically file them into the correct folder. You can perform regional, full-page or bar code OCR on documents.

Desktop Extender

The Desktop Extender allows a user working in a Windows application to search for documents in DocRecord based on key fields or highlighted text within that Windows applications. The value, when processing documents, is that it provides an immediate tie-in between DocRecord and any backend application such an accounting, HR, operations, or even company-proprietary software. This greatly speeds related-document searches which are often an essential part of a document process such as processing invoices, sales orders, HR documents, manufacturing and distribution records, and more.

Categorize and Index Your Information

DocRecord sorts files into categories based on the attributes of the documents. 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.

Document, Data & Content Organization

DocRecord organizes documents and content in an easy-to-use and intuitive Windows-like folder structure. Documents can be grouped together in folders based on customer, projects, location, processes, document types and much more. Users define the folders that best fit their business operations and expedite document retrieval. Folders can also be automatically created, based on extracted indexing information, by DocRecord for documents received from the Automation Server.
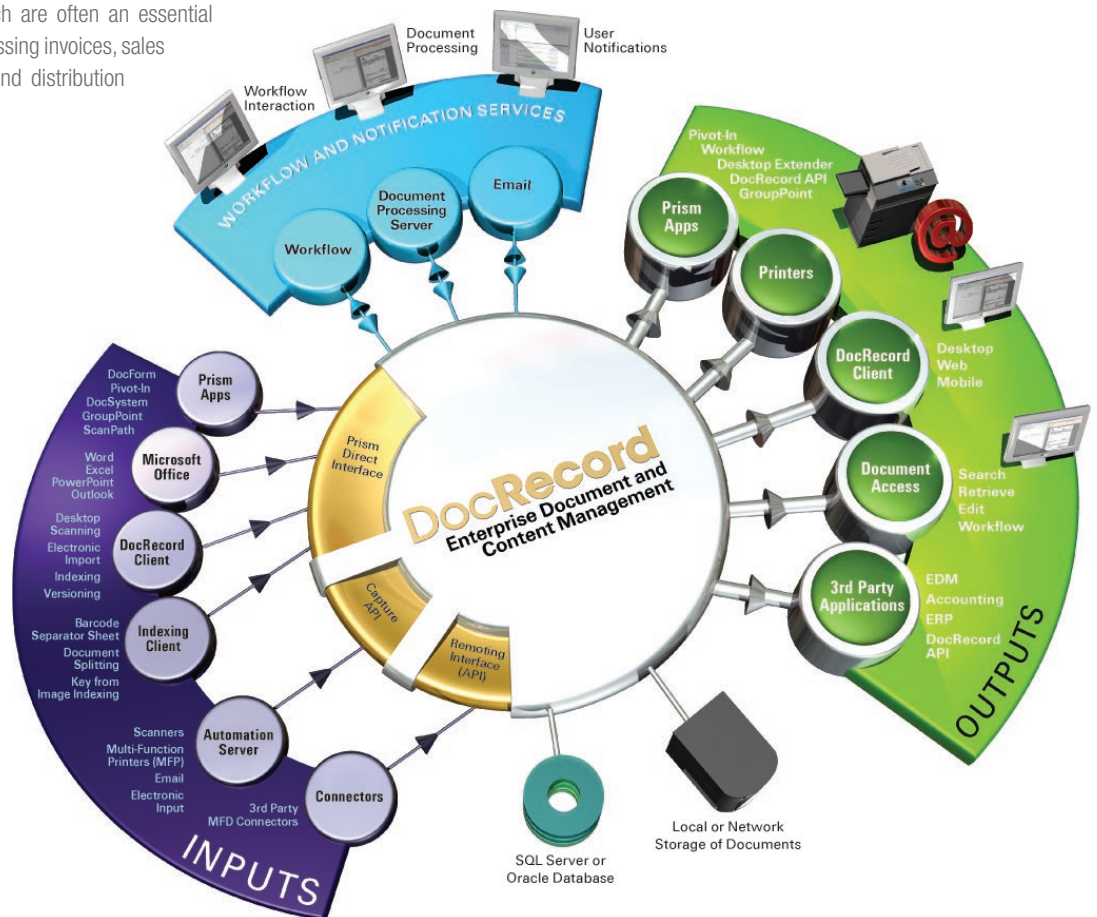
SEARCHING & RETRIEVING YOUR DOCUMENTS

## Search & Retrieve both Locally and Over the Web

Users can search for documents and content from either their desktop or any browser-enabled device such as a tablet or smart phone and is operating system independent.

DocRecord offers multiple search options including keywords, index fields, full text of a document, and the folder tree. Users can save frequent searches for future use. Users can print, fax, process, and email retrieved documents.
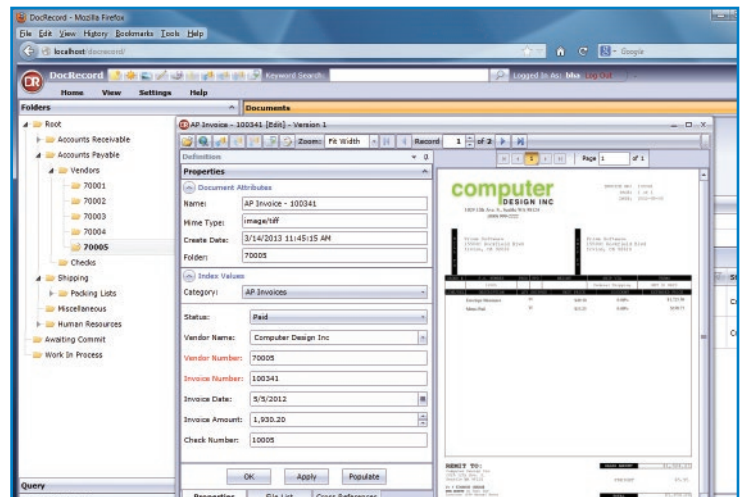

Search and retrieve over Windows, Mac and Linux
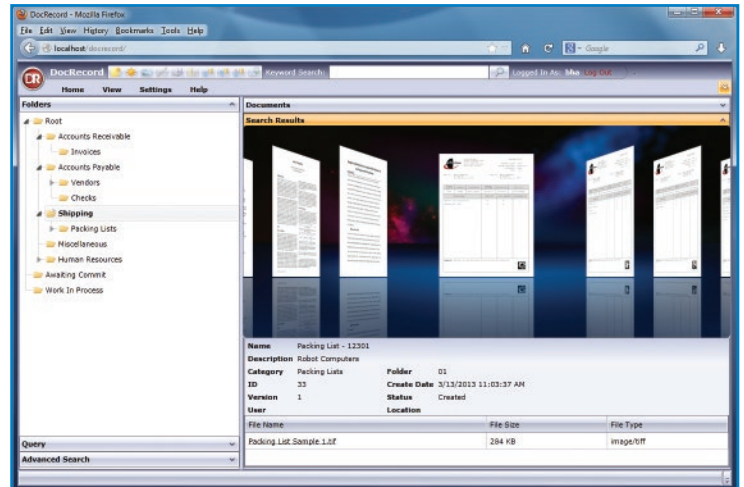
Classic Windows Structure & View
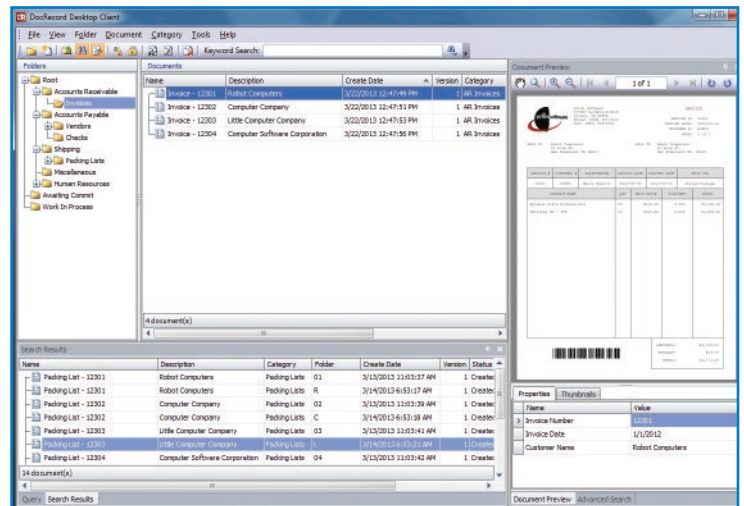
Search and retrieve from any browser-enabled device

EXPANSION APPLICATIONS FOR ALL DOCUMENT PROCESS REQUIREMENTS

Expansion applications by Prism provide additional document processing and automation capabilities to DocRecord. These applications are designed to be both fully integrated with DocRecord or stand-alone applications.

GroupPoint: Advanced Desktop Document Processing

GroupPoint, a desktop application integrated with DocRecord, allows users to check documents out, modify them, and then check them back into DocRecord. Within GroupPoint, users can perform a wide range of document changes including annotation, adding additional pages and other documents, editing, and more. Personal and departmental workflows can be created for automatically sharing the documents with others.
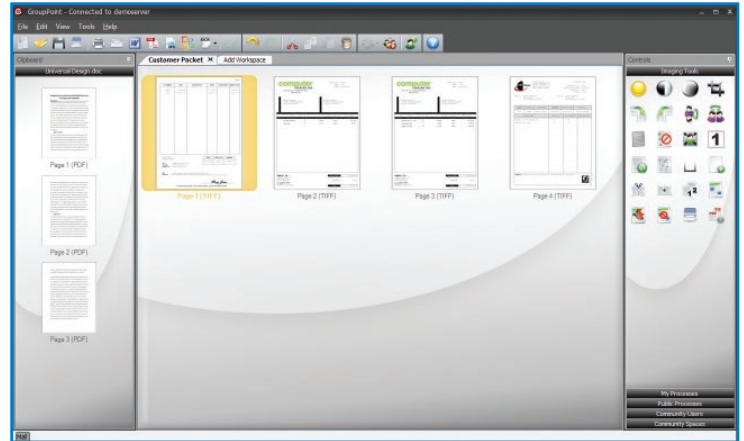
Pivot-In: Automated Data Extraction & Entry

Pivot-In provides a powerful yet easy way of extracting important data from scanned and other documents. Pivot-In performs an intelligent keyword OCR on selected documents and automatically identifies and extracts the key data you've pre-identified. It presents this data to you for you verification, and once verified, automatically sends it to other line-of-business solutions such as accounting or ERP applications. hin GroupPoint, users can perform a wide range of document changes including annotation, adding additional pages and other documents, editing, and more. Personal and departmental workflows can be created for automatically sharing the documents with others.
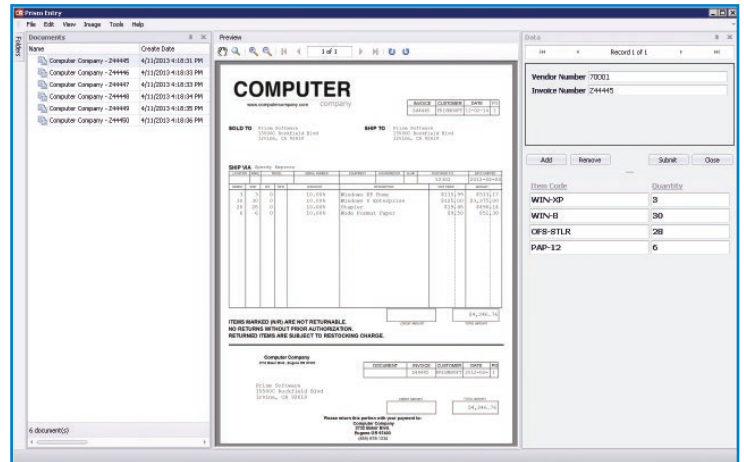
DocForm: Automated Document Creation & Filing

DocForm is an industry-leading variable data and workflow application that can create complex custom documents and then send these documents to DocRecord for automatic indexing and filing. The value of this is that bulk documents - such as invoices, purchase orders and customer notifications - can be created in DocForm and then workflow-routed to DocRecord for automatic filing and archiving. These records are then instantly available to others such as accounting and customer service.

FEATURES

- Automated document naming, routing, indexing & filing

- Access documents through either a Desktop Client or Web Client

- Automated batch splitting and indexing of mixed document types

- Microsoft Office one-button integration

- Access documents from Windows, Mac or Linux OS

- Microsoft SQL Server or Oracle database compatibility

- Recognition of text and barcodes

- Zonal OCR (optical character recognition, template-based)

- Full-page OCR (including the creation of searchable PDFs)

- Barcode cover sheets

- Index and full-text searching of documents

- Collaborate on documents via check-in/check-out process

- Document versioning/history

- Secure audit trails for documents

- Document retention policies

- Cross referencing of related documents based on common index values

- Automated email capture

- User role-based security that integrates with Windows Active Directory

- Workflow – Powerful tool to customize the steps a document must go through in order to be "complete"

- Auto Populate – Eliminate duplicate data entry by auto populating index values based on an existing ODBC data source

- Desktop Extender – Allows you to "image-enable" your line-of-business application to connect to DocRecord using screen scraping technology

- DocRecord API – .NET API to allow for a programmatic retrieval of documents residing in DocRecord through a custom third-party application

ARCHITECHURE & MODULES

DocRecord is a Microsoft Windows application. Its Base System and other modules are installed on a Windows server. DocRecord's HTML5 browser-based web client works on any browser-enabled operating system and device (such as smart phones and tablets) and its Silverlight web client works on Windows, Mac, and Linux operating systems.

DocRecord Base System, for both desktop and web users
Add required number of concurrent users and modules to customize DocRecord

DocRecord Automation Server
For automated document processing

DocRecord Indexing Client
For power users requiring manual review and indexing capabilities

DocRecord Desktop Extender
Easily look up DocRecord files based on key words from any Windows application

DocRecord Workflow Server
Provides document workflow capabilities throughout an organization

DocRecord OCR & Barcode Server
Provides OCR for text and barcode for batch document processing

DocRecord API
Provides integration with an organization's website and other line of business applications

Other Prism applications fully integrated with DocRecord
GroupPoint
Pivot-In
DocForm

Doc**Record**™

6/15/13