

Document Management and Workflow Systems

Great, you've finally managed to centralize all of your documents onto a file server. No more yelling over the top of the cube wall asking Joe to send you the Peabody file. No more worrying about whether everyone in the office has backed up their desktop system. Life is good.

Right?

Except Bill names his files differently from everyone else, and Sue can't figure out which folder to put hers in. Pretty soon you're walking the hallways asking where the Peabody case file is stored on the file server. Aren't you glad somebody printed it out?

Then there's all the paper files that you exchange with other offices and customers. You're still making visits to the file cabinets down the hall, just to find that the file is checked out, or even worse, just plain gone.

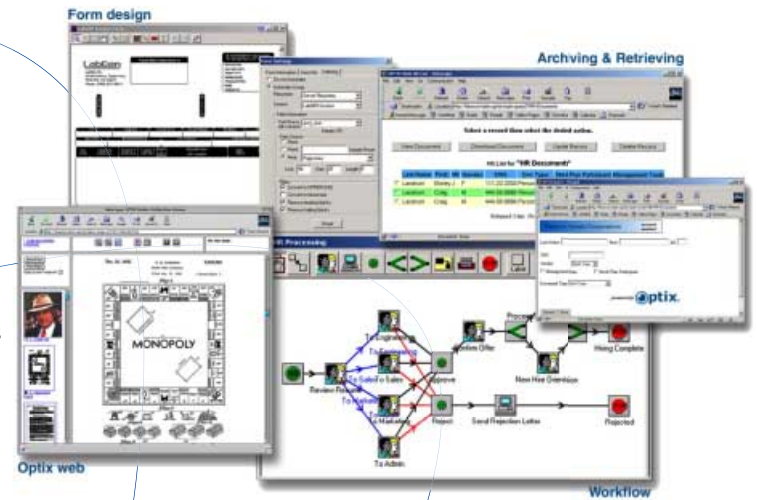
**Document Management.** Create a central repository of all your documents: word processing files, spreadsheets, and scanned paper documents all centrally managed, consistently indexed and searchable, and secure so only those authorized can see the file.

**Optix makes document management easy.** We provide drag-and-drop tools that allow you to quickly design your index and retrieval application. You can create multiple indexes so you can search for the documents in different ways. And we even create the database tables on the system for you - no need for a programmer or a database administrator.

**As your needs grow, so does Optix.** Optix supports thousands of users, millions of documents, terabytes of storage.

**Your Optix system can be enhanced with other optional modules to make your organization more efficient.** Workflow allows you to manage business processes by routing documents to those who need to review and approve them. Just use our Graphical Route Editor to design your review process, complete with your business rules.

**Optix Web provides access to your document repository through a browser.** Great for those casual users who need occasional access to the repository, to provide access to remote offices or your "road warriors", or to make portions of your files available to the internet.



*"Optix is the first system I ever purchased that did everything it said it could - and more"*

*Joe St. Marie, Supervisor, Archives and Records Center, Bechtel Nevada*

**With our text search modules you can search by document content.** Our Natural Language Search module allows you to search popular desktop files for any word in the document, plus sophisticated language processing through a semantic network allows you to search for concepts by ranking documents by both related terms and their proximity within the document. Our Boolean engine allows you to search ASCII text and OCR'd files.

**Our COLD module allows you to take information from legacy mainframe systems and make it available throughout your organization, even make it available in a browser with Optix Web.**

**And when you need your documents on the road, our Database Publisher module allows you to create a stand-alone copy of the files and the index values.** Imagine having all those contract files and orders available on your laptop for the next sales trip - or your case files in the courtroom.

**So instead of that wild-and-wooly file server, let Optix manage your files so everyone can quickly find exactly what they need - their way.**

# Document Management - Technotes

## Overview

- Optix is a complete document management solution that supports native Macintosh and Windows clients, as well as access via a Browser.
- A central repository of all your documents including desktop files and scanned paper documents.
- Design multiple index and retrieval applications using the Optix Screen Generator which allows you to design the user interface via drag-and-drop, and will even automatically build the database table for you.
- Store files securely on hard drives, RAIDs, NAS, HSMs, even optical disks and jukeboxes. Optix can use devices that are integrated into the operating system and appear as a file system.
- Optional modules provide workflow services, web access, text search, COLD, and publishing.

## Details

### *Document Management*

- High-speed scanning supported from both Macintosh and Windows clients. Capture your documents at pages per second speeds.
- Batch processing supports form scanning, zoned OCR, patch cards, and index merging to quickly input scanned files.
- Document check-in/check-out ensures that only one person changes a document at a time, preventing lost work.
- Automatic revision control keeps all versions of the document so you can review its history, and go back to previous versions if necessary. Each revision is time stamped and the person who made the change is automatically recorded.
- Supports multiple security models including three-level owner-group-world and sophisticated access control list (ACL) security to provide fine grained control over document access.
- Thick clients support non-destructive image annotation that allows you to mark up documents and make notes, without affecting the legal authenticity of the original image.
- Document hyperlinking allows you to quickly associate related documents.
- Macintosh client supports AppleScript, Windows client supports OLE automation for integration with other desktop applications and custom processing.

### *Other Features*

- Process based workflow allows you to define your business process for document creation or review using our drag-and-drop Graphical Route Editor.
- Optix Web provides thin client access via CGI or J2EE to your repository.
- Boolean and Natural Language Search text search engines allow for full text search by document content. (Features vary depending on engine and platform)
- COLD takes report output from legacy systems and makes it available online as either text over forms, or as images.
- Database Publisher allows you to extract a subset of your repository, complete with index, and create a stand-alone database that you can take on the road.
- Java and C API available for integration with ERP packages, legacy systems, and other applications for true enterprise integration and deployment.



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