



A guide to identify the right Electronic Content Management (ECM) Document System.

Many times I am asked to give lectures on Document Management Software. Briefly, I try and explain what to ask a software developer **first** in examining any Electronic Content System ECM. The questions I pose bring out and help identify whether the software application is “proprietary in nature” or open architecture, and are the products low end or considered industrial grade?

If not asked in a certain way, most document software vendors will gloss over the answers and move on to the features of the product. Not good. Generally, many questions need to be asked, to ascertain if the product is proprietary or low end or both. Far too often proprietary electronic document management software applications will get customers into trouble down the road. Too often we are called in after the fact. It’s becoming a weekly occurrence to listen to the stories. Customers generally will examine what I call features, functionality and price issues. That’s natural; but they fail to examine what will make any document management software application successful for the long term. In other words, “what’s under the hood”?

At this juncture, it is appropriate to provide you with some questions that will help you quickly identify if a document software application is proprietary or open, is it what we call “industrial grade”. I believe you will find some of these questions fun and interesting. Many of the questions you may already know. I will take this opportunity to answer these questions up front regarding the Digitech products. To protect your organization, it is up to you to ask these same questions of any ECM supplier.

Questions:

1. What is the database that the product supports or uses? Am I required to purchase a separate Database?

Answer: The PaperVision Enterprise or PaperVision Xpress (Viewer software products) comes out of the box with MSDE and can be linked to your SQL server. No, you do not need to purchase a separate data base.

2. How are the products licensed?

Answer: The PaperFlow (Scan Utility) is licensed by workstation and has an unlimited number of scans. The PaperVision Enterprise or PaperVision Xpress is sold concurrently. Basically, you can run the PaperVision Enterprise or PaperVision Xpress on as many workstations as you please.

3. Are the products sold modularly and are there other products that the developer has that will work with the core application?

Answer: The short answer is yes. Please refer to “Available Products”, for a host of additional software products that the developer offers.

4. What type of image file is created in the scan application? Are there any extensions in front of the image file?

Answer: Standard tiff or jpeg. There are no proprietary scanned images.

As a follow up question: How can we protect standard tiff images on the server?

Answer: Without going into a lengthy discussion about all the security features within PaperVision Enterprise, and the ability to perform an audit trail within PaperVision Enterprise, on your server, you can secure, protect, hide or lockdown your files. The product leverages Microsoft technology, therefore Digitech Systems are not reinventing the wheel.

5. Does the viewer application come both thin and thick?

Answer: The PaperVision Enterprise software comes ready to go, right out of the box with both thin (internet) and thick (network).

6. Can we tie the viewer application to other applications or custom modify?

Answer: PaperVision Enterprise comes out of the box with API calls, plus source code.

7. Does the developer provide the source code?

Answer: The PaperVision Enterprise comes out of the box with source code.

8. What happens if the software developer goes out of business or we decide to move to another document application altogether? What standard do you provide to export our images and index data? (**Extremely Important Question**)

Answer: PaperFlow Lite comes out of the box with an export utility. At a minimum, this utility will export an ASCII text with standard tiff images. This utility will also export over forty other document systems directly.

9. What does the system support in terms of archive/retrieval issues?

Answer: PaperVision Xpress and PaperVision Enterprise supports retrieving from anything; servers, DVD, CD's, Optical, RAID, Tape, Jukeboxes, Etc. In fact, the PaperVision Enterprise product has built in load balancing. Kind of Cool!

10. What is the general wait time regarding support? Who is providing support, the developer or the reseller? Where is support coming from? (**Extremely Important Questions**) You might as well know up front what support will be like before you purchase any product. We strongly recommend that YOU the **customer validate** all answers before purchasing **ANY** product!

Answer: The customer will get direct product support on all the Digitech products **direct** from the developer. Generally, almost with out exception, a support technician will be on the phone, with you, as soon as you call. The help desk hours are from 9:00 a.m. to 6:00 p.m. est. Customer support comes from Lincoln Nebraska, with a back up facility in Denver Colorado. 1.877.374.3569 ext 2. WE RECOMMEND THAT YOU GIVE THEM A CALL!

11. How many scanners or scanner models does the product support?

Answer: Any scanner with an ISIS driver. I.e. just about every one.

12. Am I required to purchase a workstation from the reseller in order to run the application?

Answer: No, any IBM clone running Windows 2000x, XP or NT will work.

13. How are major releases of the products handled? Do I have to purchase these releases or are they included under the support contract?

Answer: Under the active support contract, **all** minor and **major** releases of the products are included.

14. What happens if we are scanning from other facilities but wish to retrieve from one central server?

Answer: In the PaperFlow product, the customer can FTP or perform a copy function to a server. Both functions can be set automatically.

15. What is batch scanning? How is it performed and can we bring other index data from another data base?

Answer: Batch scanning is the ability to scan large amounts of documents (i.e. file folders) all at once, and have the system automatically separate each document. In the Paper Flow product by using a bar code separator page, the system will automatically separate one document from another. Indexing can be performed separately, manually, zone OCR or bar code. If there is a unique number i.e. social security #, case file #, Human Resource # vendor id etc., the system can perform a

match with your other legacy system to bring additional index data elements automatically into your document retrieval application. Batch scanning and Batch indexing are a big savings in processing time!

16. If we are scanning image files, how many images can we expect to save on a given size? Let's use a standard 600mb file size for storage, scanning 8 ½ x 11 paper, at 200dpi.

Answer: The PaperFlow product has the ability to perform what is termed "Post Processing". This can be set to run automatically. Basically, this utility is designed to "clean up" your images. In doing so, it condenses the tiff files. Generally, as a standard, you will find that the number of 8 ½ x 11 paper, scanned in at 200dpi, will be in the range of 9,000 to 12,000 tiff images. Fairly impressive! In our service bureau, after we run the post processing utility, we are experiencing in the range of 22,000 to 31,000 images for a 600mb storage size. That's a lot of images!

17. Are the product(s) "End User Friendly", or is it a techy product?

Answer: The truthful answer is; it is in the eye of the beholder. A quick way to judge what is truly "End User Friendly" is the amount of time to train. As a general rule, if it only takes a day or two to train, that's a good thing, but if it's going to require a week or two, for a system person to learn the software application; well what can I say!

The bottom line is that we have users that are PC challenged and use the system!

The next three questions are designed for the company that wants to offer Imaging Services. Some of these questions and answers I have outlined above, but under this context are worth note and further examination.

18. As a new service bureau, you will from time to time be offering your services to a company that may already have an imaging system. What are you going to do? Are you going to purchase that system so you may be compatible with it? This can get expensive.

Answer: See question 8. PaperFlow Lite comes out of the box with an export utility. At a minimum, this utility will export an ASCII text with standard tiff images. This utility will also export over forty other document systems directly. In other words, why not have **ONE** document processing application that will support all the others! Kind of Cheaper that way!

19. What happens if I have a customer that does not have an Imaging System?

Answer: Many document systems are not sold modularly, therefore your customer will be required to purchase, from you, a full document system. That will get expensive for the customer. Besides, at that juncture, what does the customer need you for? Because the Digitech products are sold modularly, your customer may

only need to purchase a viewer from you i.e. PaperVision Xpress or PaperVision Enterprise. The developer also offers Image Silo, a service, which allows your customers to retrieve their documents over the web without the expense of purchasing any viewer software.

20. Support for my customer, how is this handled?

Answer: Even though I touched on this subject under question 10, as a business model and potential expense to your business, it is worth repeating. Most EDM software companies and I dare say, just about all, will require **YOU** to be what we call in the industry “first line of defense”. Good luck, this will get expensive. What “first line of defense” basically means is that your business will be required to provide direct customer support. The quality of support will be in direct portion to your knowledge base of the products and your availability. To run a top flight support center will get expensive. As noted in question 10, would it not be easier and less expensive to have your customers contact the developer for support directly?

I hope the above questions and answers are of some help in your evaluation process.

If I can be of any further assistance, please do not hesitate to call me at 1. 800.886.6233

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