



Free Expression of Supreme Efficiency

90% of corporate information resides on paper ▶

15% documents are misfiled ▶

35% of office time is wasted searching for documents ▶



netGuru

Complete
Document
Solution



Preamble

DocuGuru is a **document management system** (DMS) used to track and store electronic documents and/or images of paper documents. The term has some overlap with the concepts of Content Management Systems and is often viewed as a component of Enterprise Content Management Systems and related to Digital Asset Management, Document imaging, Workflow systems and Records Management systems.

DocuGuru is a solution for enterprise level collaboration. Managing documents, creating workflows and schedules can be a tedious process. DocuGuru is a web-based document management system that converts COMPLEX to SIMPLE. DocuGuru's user-friendly interface allows hassle-free navigation. It stores all documents in a central repository, which resides on your server for added security.



Studies show that in most corporate environments, knowledge workers spend up to 40 percent of their time trying to find documents they need in their daily routines.

Time spent searching for and re-creating documents that already exist, and shuffling through unstructured information account for billions of dollars of wasted time in the US alone.

Methodology

Below are the addressed methods for DocuGuru- document management:

Most methods in DocuGuru for managing documents address the following areas:

Location: Where will documents be stored? Where will people need to go to access documents? Physical journeys to filing cabinets and file rooms are analogous to the onscreen navigation required to use a document management system.

Filing: How will documents be filed? What methods will be used to organize or index the documents to assist in later retrieval? Document management systems will typically use a database to store filing information.

Retrieval: How will documents be found? Typically, retrieval encompasses both browsing through documents and searching for specific information.

Security: How will documents be kept secure? How will unauthorized personnel be prevented from reading, modifying or destroying documents?

Disaster Recovery: How can documents be recovered in case of destruction from fires, floods or natural disasters?

Retention Period: How long should documents be retained? This is an organizational policy/practice that defines what information should be retained and for how long.

Document Viewing: Should be able to view most of the popular formats.

...cont'd



Archiving: How can documents be preserved for future readability? Archiving is the removal from the active repository of documents and related metadata that have, by organizational definition, reached the end of their active lifespan, and are required to be stored, or archived, in a separate area. Usually archiving entails movement of documents, whether paper or electronic to a separate storage facility, be it an archival warehouse, or a nearline or offline storage device.

Distribution: How can documents be available to the people that need them? Not only the documents be available digitally, they would be available physically.

Workflow: If documents need to pass from one person to another, what are the rules for how their work should flow?

Creation: How are documents created? This question becomes important when multiple people need to collaborate, and the logistics of version control and authoring arise.

Authentication/Approval: How do we provide needed requirements for legal submission to government and private industry that the documents are original and meet their standards for authentication?

Components

DocuGuru commonly provides capabilities on storage, versioning, metadata, security, as well as indexing and retrieval capabilities. Here is a description of these components:

Metadata

Metadata is typically stored for each document. Metadata may, for example, include the date the document was stored and the identity of user storing it. The system may also extract metadata from the document automatically or prompt the user to add metadata. The system also use optical character recognition on scanned images, or perform text extraction on electronic documents. The resulting extracted text can be used to assist users in locating documents by identifying probable keywords or providing for full text search capability, or can be used on its own. Extracted text can also be stored as a component of metadata, stored with the image, or separately as a source for searching document collections. User could define unlimited number custom metadata fields, of multiple types.



Users could view the full audit trails on all changes made to a document's metadata.

Integration

DocuGuru integrates document management directly into other applications. This way user may retrieve existing documents directly from the document management system repository. They will be able to make changes and save the changed document as a new version, all without leaving the repository. Such integration is commonly available for office suites and e-mail or collaboration/groupware software. Integration often uses open standards such as ODMA, LDAP, WebDAV and SOAP to allow integration with other software and compliance with internal controls.

Capture

Images of paper documents using scanners or multifunction printers. Optical Character Recognition (OCR) whether integrated into the



hardware or as stand-alone software is being used, in order to convert digital images into machine readable text.

Indexing

Track electronic documents. Indexing is as simple as keeping track of unique document identifiers; but often it takes a more complex form, providing classification through the documents' metadata or even through word indexes extracted from the documents' contents. Indexing exists mainly to support retrieval. One area of critical importance for rapid retrieval is the capability to create of an index topology.

Storage

Store electronic documents, storage of these documents includes, where they are stored, how long, migration of the documents from one storage media to another (hierarchical storage management) and document destruction.

Retrieval

Retrieve the electronic documents from the storage. Simple retrieval of individual documents is being supported by allowing the user to specify the unique document identifier, and use the basic index and/or a non-indexed query on its data store to retrieve the document. The flexible retrieval allows the user to specify partial search terms involving the document identifier and/or parts of the expected metadata. This typically returns a list of documents which match the user's search terms. The system also provides the capability to specify a Boolean expression containing multiple keywords or example phrases expected to exist within the documents' contents. The retrieval for this kind of query is being supported by in-built indexes, or may perform more searches through the documents' contents to return a list of the potentially relevant documents.

Security

Document security is vital for any document management applications. Compliance requirements for certain documents is being maintained by providing a rights management module that allows an administrator to give access to documents based on type to only certain people or groups of people.

Workflow

There are different types of workflow. Usage depends on the environment the DMS is applied to. **Manual workflow** requires a user to view the document and decide who to send it to. **Rules-based workflow** allows an administrator to create a rule that dictates the flow of the document through an organization: for instance, an invoice passes through an approval process and then is routed to the accounts payable department. **Dynamic rules** allow for branches to be created in a workflow process. A simple example would be to enter an invoice amount and if the amount is lower than a certain set amount, it follows different routes through the organization. Various templates can be created and saved for future use.





Collaboration

Collaboration is inherent in DocuGuru. Documents is capable of being retrieved by an authorized user and worked on. Access is being blocked to other users while work is being performed on the document.

Versioning

A process by which documents are checked in or out of the document management system, allowing users to retrieve previous versions and to continue work from a selected point. Versioning is useful for documents that change over time and require updating, at the same time one could also go back to a previous copy.

Docuguru® Feature Benifits

- **Version control** is applied to every version of every document to prevent accidental overwrites & deletions
- **Connects with scanners or multi-function centers** to turn mountains of paper into searchable electronic files
- **Flexible policies for record retention & destruction** ensure you retain the documents, data and usage history needed to stay in compliance with SOX, HIPPA etc.
- **Full-text & Tag Based Search** quickly finds what you need based on document content
- **Tightly integrated with Microsoft Office 2003** for use with Word, Excel, Outlook, PowerPoint and Visio
- **Workflow** routes documents to co-workers for approval or comment. Sign-off sheets track who has approved which version of a document
- **Work with your documents anywhere** using a standard web browser or the provided desktop application
- **Automated e-mail notifications** and reminders alert users to documents needing their attention
- **Import document en masse** with easy to use controlled document tagging ensures documents are classified for recovery
- **Intuitive library** mimics your current office filing structure. Easy to use & requires little end user training
- **Out-of-the-box security** with pre configured roles for Read Only users, Publishers, Librarians & System Administrators
- **Service Oriented Architecture** supports thousands of users, millions of files
- **Web Services API** provides flexible integration with existing back office systems ms



Docuguru® Viewer

A true Multiple Document Interface (MDI), allowing users to open multiple documents or drawings in separate windows, then work with each individually i.e. all in One Document Viewing, Markup, Redaction, Annotation & Watermarking. Documents under review are synchronized so that all online meeting attendees can view crucial comments and annotations made by other meeting participants.

All meeting transactions, including markups, versions, text chat, and annotations are logged and saved, available for future playback using XML.



Multi File Format Viewing

Built in document viewer supports over 150 CAD, image and document formats, including Microsoft Office, PDF, and 45 EDA \ ECAD\ PCB formats.

View and Print

View and print virtually any native format, from Microsoft Word and PDF to AutoCAD and MicroStation.

Markup and Annotate

DocuGuru has the full range of markup tools you'd expect in a multi-format viewer. Markups are saved as separate XML overlays, so the original document is never touched. And markups can be burned in at publish time for easy, secure distribution.

Document Redaction

Document Redaction allows you to hide sensitive data from view and text search. Redaction layers are saved as separate XML overlays so the original document is never touched. Redacted areas can be burned in at publish time for easy, secure distribution.

Publish to Adobe PDF

Publish any files stored in the DocuGuru Library to Adobe PDF format in one simple click.

Watermarking

Apply template or custom watermarks to documents prior to publishing, distribution or printing.

Measurement Tools Support

Including Measurement takeoff count, Auto-scaled calibration, Line, rectangle, polygon/area measurements and snap to drawing surface tools.

CAD Layers Support

Supports viewing by layers for CAD file formats. Also shows object attributes, prints to scale, and has measurements with geometry snapping.

If you have employees who spend most of the day filing or retrieving documents, or if you spend good money every month to warehouse old paper records, you should implement a document management

Docuguru® Solution Benefits

- Web Based
- Prevents lost records
- Saves storage space
- Manages records easily
- Finds documents quickly
- Makes images centrally available
- Eliminates the need for file cabinets
- Nominal Training required
- Simple Implementation
- Enterprise security
- Requires little or no behavioral change of any organizations
- Easy to use and intuitive interface
- Provides a uniform collaborative environment

Implementation of DocuGuru can help a business increase its visibility into the real-time status of an entire business document's lifecycle. Business tasks can be quickly created, cancelled, suspended or restarted as needed upon acquiring new intelligence.

Docuguru® Supports

- **Operating System**
 - Microsoft Windows®
 - Linux
 - UNIX
- **Browsers**
 - Mozilla Firefox
 - Microsoft Internet Explorer
 - Apple Safari
- **Language**
 - English
- **Integration Interfaces**
 - SOAP Web Services
 - JSON
 - WebDAV



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