

Document Manager 2.7 Enterprise Edition.

Summary

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

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

The purpose of this document is 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 function 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 covered by our annual maintenance and support agreement you are entitled to upgrade to the latest version of software. Some new features / modules are optional and may incur a small fee.

Depending upon the version you are upgrading from you may require some assistance from our Professional Services team. Please contact us for advice.

Features Introduced with 2.7

- Document Preview (images and MS- Office Documents)
- "Unlimited" Document Level Indexes
- Tabbed Folders/Search Results
- Saved Workspaces
- Search within Search Results
- Filter Folder lists
- Support for Retention Policy Module
- Additional Encryption methods Triple DES and AES
- Document types can force 'New Version' on Check-In
- Customisable splash screen
- Edit multiple document indexes at once

Document Preview

A document viewer can be opened alongside or below document lists to show the contents of the highlighted document, as selected, without having to double click to open the native application for that document (i.e. Word, Excel, and PDF).

As standard this applies to all image document types including PDF, but an optional MS-Office document preview module can be purchased to view the contents of Office documents including Word, Excel, PowerPoint and Outlook messages.

This makes locating the documents much more convenient and quicker, and frequently removes the need to open the documents at all.

The document preview not only allows the document to be viewed but all the features of the document viewer are available, including Print, Email, Export, Annotation, Workflow, Edit Indexes etc.

Using the preview it is now possible to place annotations on Office documents (these will only be visible within our previewer, not within Word etc...), annotations can have permissions associated with them.

When previewing emails, not just the message but all the attachments are previewed, and can be selected by paging through the multiple pages.

The preview can either be docked to the side of the document lists, or positioned separately, an ideal option for users with dual displays.

“Unlimited” Document Level Indexes

Historically the number of user defined indexes was limited to 20 folder level indexes and 10 document level. This proved to be a limitation for some users, particularly where complex workflows were using document indexes to save statuses or approver names.

In 2.7 there is now a total of 100 document level indexes (per drawer) which we believe should be sufficient. We will be adding features to selectively show or hide certain indexes so that the document properties screen does not become too full.

Tabbed Results

In 2.6 and previous version each time a folder was opened or a search result returned a list, a new child window was created. With many child windows open switching between them was awkward.

In 2.7 we now have an option to use Tabbed results, so there is a single area for document lists with a tab for each result list, very much like a tabbed web browser.

Saved Workspaces

Workspaces were temporary lists of documents used to group multiple documents, usually from different folders, so that they could be printed or emailed together.

In 2.7 you can now save these workspaces so you can come back to them later. For example a set of documents that relate to a project you are working on.

Workspaces can also be made global, allowing other users to share them for collaboration, or simply to reference things like company Announcements.

Searching within Search Results

When a search returns a large number of results, it is sometimes useful to be able to further reduce the number of results by searching within them. With 2.7 you can now search within search results, for example, a Search for *Document Description Contains "DLX"* may result in 1000 documents, but in that result list you can now search for *Document Description Contains "Web"* and get a subset of documents which contain both the words "DLX" and "Web".

Filter Folder Lists

Where a folder has been opened that contains lots of documents and it is difficult to locate the one you want, you can now filter the documents.

This is similar to a Search within Search but applies to folders, and allows selected documents to be listed for that filter. For example, *Document Description Contains "Web"*, or *Document Type is "Bulletin"*.

Retention Policy Module

Coming very soon is the optional retention policy module, which will allow documents to be automatically archived or deleted based on rules. In order to use the retention policy module you will be required to upgrade to 2.7 as this provides the user interface options to set the retention criteria.

Additional Encryption Methods

Document type encryption now supports Triple DES and AES as encryption methods with configurable key lengths to a max of 256 bytes.

Force new version on Check-In

When an application document is checked in, depending upon the document type the user can be forced to create a new version. Useful where you need to keep all changes made to documents.

Customisable Splash Screen

If you want to give Document Manager a corporate look and feel you can now design your own splash logo. Create a bmp image file 650 pixels wide by 70 pixels high and it will appear on the splash screen and the help/about window.

Edit Multiple Document Indexes at once

Previously if you wanted to change an index on several documents to a common value (for example “status=paid”) this had to be done individually for each document. Now you can select a number of documents and then edit one or more document indexes to update all the documents at once.

SMTP eMail

Document Manager now supports sending of emails by SMTP. If the workstation has no email client installed (MS Outlook for example) the client can send directly to an SMTP mail server configured in the Administration module.

The Future

There is always new development under way at Document Logistix and we have a roadmap of new products and features for 2012 and beyond.

The near future:

- Release of Retention module (currently in testing)
- Approval specific workflow actions with Approval limits and hierarchy (currently in testing)
- Enhanced Accounts Payable coding/approval module

Further out:

- Web based replacement for Sorting Office (Batch Scan)
- Portable device user interface (iPhone and iPad)

Features Introduced with 2.6

- Windows 7 Certified (32 and 64 bit)
- 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 Add-in (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 a 3rd Party document previewer.

Features Introduced with 2.2

- Workflow Users 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