

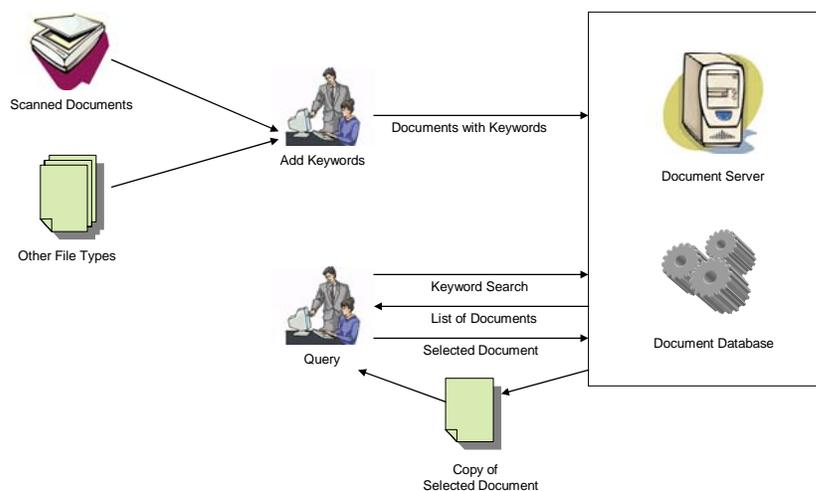
Introduction

The **Document Management System (DMS)** is a web-based application designed to allow for storage and retrieval of documents with user-defined document types, document groups, and keywords. The easy-to-understand document management capabilities of **DMS** allows companies to move quickly toward a paperless office environment.

Developed by Information Advantage Associates, the key features of **DMS** include:

- Handles any kind of computerized file
- Web-based user interface
- N-tier application architecture
- Multiple levels of security
- Original document is never directly accessed by the user after document load
- Multiple search criteria for document retrieval
- Multiple user-defined hierarchies provide graphical filtering of documents
- Document groups and types configured by user
- Keyword types and values configured by user
- Integrated with office applications and scanners for easy document loading
- Management reporting

Document Management Server - Overview



Document Retrieval

DMS provides an intuitive interface for searching and retrieving documents. Hierarchies, which provide graphical filtering, combined with multiple keywords allows the user to create flexible combinations of search criteria to find relevant documents.

Key features of the Search Screen include:

- User-defined searchable keywords
- User-defined hierarchies
- Full details presented for each matching document
- Tabbed interface to easily view detailed information
- Create unlimited number of notes
- Select document to retrieve and review

Document Management Server

Search Criteria

Document Group : Sales Document Type : Sales Forecasts

Uploaded Between : and Uploaded By : (All)

Keyword and Value Selection

Keyword: Customer Value: Ultimate Distributors Add

Customer Ultimate Distributors

Result Displaying 5 Document(s) of 5. Search Clear

View	Group	Type	Description
	Sales	Sales Forecasts	Forecast for 2006
	Sales	Sales Forecasts	
	Sales	Sales Forecasts	Ace Sales Projections
	Sales	Sales Forecasts	Revised Sales Forecast - Ultimate East Q2 2006
	Sales	Sales Forecasts	Revised Sales Forecast - Ultimate Central Q2 2006

Details Edit

Summary Keywords Notes History Hierarchy

Document Type : Sales Forecasts Uploaded By : Information Advantage Assoc

Document Group : Sales Uploaded Date : 5/18/2006 10:04:00 AM

Document Size : 13824.00 Bytes File Name : Forecast2 Ultimate East Q2.xls

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Each document matching the search criteria is returned in a Results Grid for review. A tabbed interface is provided for reviewing details about each document. These tabs include:

- **Summary** – provides selected data about the document

Details Edit

Summary **Keywords** Notes History Hierarchy

Document Type : Sales Forecasts	Uploaded By : Information Advantage Assoc
Document Group :Sales	Uploaded Date : 5/18/2006 10:04:00 AM
Document Size : 13824.00 Bytes	File Name : Forecast2 Ultimate East Q2.xls

- **Keywords** – lists all keywords and values associated with the document

Details Edit

Summary **Keywords** Notes History Hierarchy

Keyword	KeywordValue
Customer	Ultimate Distributors
Date	5/18/2006
Report Period	Q2

- **Notes** – presents all recorded notes for the document

Details Edit

Summary **Keywords** **Notes** History Hierarchy

Date	User	Comment
5/18/2006 10:15:00 AM	Information Advantage Assoc	Revision was needed due to unexpected closure of

- **History** – presents the audit trail of all activity regarding the document

Details Edit

Summary **Keywords** Notes **History** Hierarchy

Action	User	Date/Time
Document previewed	Information Advantage Assoc	5/18/2006 10:16:00 AM
Notes added	Information Advantage Assoc	5/18/2006 10:15:00 AM
Document uploaded	Information Advantage Assoc	5/18/2006 10:04:00 AM

- **Hierarchy** – lists details about each hierarchy for the document

Details Edit

Summary **Keywords** Notes History **Hierarchy**

Document Paths
Widget Manufacturing, Inc->Sales->Central

Clicking the Edit Button will allow the user to review the complete details for a selected document. This button activates the Document Details Screen. In addition to review of detail information, selected information, depending upon security rights, can be modified.

This screen presents the following:

- Document Details
 - Allows editing of Document Type and Description
- Keywords and Values
 - Keywords and their values can be added or edited
- Notes
 - An unlimited number of notes can be added
- History
 - Complete review of the automated audit trail for this document
 - Original upload
 - Changing document details or keywords and values
 - Adding notes
 - Retrieving document

The screenshot shows the 'Document Details' interface. At the top right, there are buttons for 'Open Document', 'Request Document Deletion', and 'Close'. The main content is divided into several sections:

- Document Details:** Document Type is 'Sales Forecasts' and Description is 'Revised Sales Forecast - Ultimate East Q2 2006'.
- Keyword and Values - Sales Forecasts:** A table with columns 'Keywords' and 'Keyword Values'. The 'Customer' keyword has the value 'Ultimate Distributors'. Other keywords include 'Date' (5/18/2006) and 'Report Period' (Q2). There are 'Save' and 'Reset' buttons below.
- Notes:** A table with columns 'Notes', 'Name', and 'Date'. One note is present: 'Revision was needed due to unexpected closure of key customer.' by 'Information Advantage Assoc' on '5/18/2006 10:15:00 AM'. Below is a text area to 'Enter a new Note here:' with 'Add this Note' and 'Clear' buttons.
- History:** A table with columns 'Action', 'Name', and 'Date/Time'. It shows three actions: 'Document previewed', 'Notes added', and 'Document uploaded', all by 'Information Advantage Assoc' on '5/18/2006'.

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Clicking the View Icon on the Search Screen or clicking the Open Document Button on the Document Details Screen will initiate retrieval of that document. When a document is selected for retrieval **DMS** locates the requested document, places a copy of the original document in a temporary work folder, and presents that copy to the user for review.

Document Loading

Loading documents into **DMS** can be accomplished through a variety of methods. These include:

- Utilizing the upload screen provided in **DMS**
- Using our automated scanner interface to capture Keywords and upload into **DMS**
- Using our shell extensions to directly load files with Keywords from office applications

Document Management Server

Search Upload Administration Logout Information Advantage Assoc

Upload Document

Select Common Keywords

Keywords	Keyword Values		
Date	5/18/2006		
Report Period	Q2		Add/Change Value
Customer	Ultimate Distributors		Add/Change Value
Sales Region	Central		Add/Change Value

Add Document(s)

Document Type: * <<-Document Type--> * Indicates mandatory fields.

Description:

File: * Browse...

Review & Upload Confirmation 2 Document(s) added to the List. Add To List Reset

<input type="checkbox"/>	Document Type	File	Description		
<input type="checkbox"/>	Sales Forecasts	C:\Attachments\Forecast2 Ultimate East Q2.Xls	Revised Sales Forecast - Ultimate East Q2 2006		
<input type="checkbox"/>	Sales Forecasts	C:\Attachments\Forecast2 Ultimate Central Q2.Xls	Revised Sales Forecast - Ultimate Central Q2 2006		

Confirm Upload Cancel Upload

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Multiple keywords can be utilized for each document. Depending upon the Document Group different Keywords will be presented. Keywords and their values, as well as

Document Type and Description can be changed, as necessary, after the document has been uploaded.

Any type of file can be stored in **DMS**, including:

- PDF and searchable PDF
- Pictures – GIF, JPEG, TIF, PCX, BMP etc.
- Office documents – word processor, spreadsheet, text
- Archive files – ZIP, RAR, PGP, etc.
- Database files – Access, FoxPro, dBASE, etc.
- Any other type of computerized file

Technical Considerations

The user interface for **DMS** has been developed using Microsoft's ASP.Net development toolset. Data for the application can be stored in either a Microsoft Access or SQL Server relational database. If desired, the application can be configured to use other relational databases such as MySQL or Oracle.

Documents are stored in a secure network location that is accessible only by the application. **DMS** will continuously manage the storage of the document files to ensure fast and efficient retrieval.

Like the entire suite of our products, **DMS** is easy to learn, easy to manage, and priced to accommodate our client's budgetary requirements. All of our products provide flexible, scalable solutions that can be easily and quickly adapted to keep up with the constantly changing business and regulatory environment.

About Us

Information Advantage Associates is a Houston, Texas-based consulting firm that has been providing business solutions to clients since 1989.

For more information about this or any of our other products do not hesitate to contact:

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