

## PAPERWISE WORKFLOW SUITE

*PaperWise improves productivity*

*And simplifies your work life!*



*Wouldn't you like to make your life a lot easier?*

Click a single hotkey from within your favorite application to attach and file documents, emails, video images and other file types.

Click another hotkey to retrieve documents from your favorite application.

Some mad dream?

Not at all, the PaperWise Workflow Suite gives you the ability to do this and much more.

*In other words...* PaperWise simplifies your work life by eliminating tedious paper intensive processes and increases productivity by eliminating unnecessary steps in your work processes.

*Bottom line---* PaperWise saves you money.

The PaperWise Suite is an integrated, highly customizable and feature rich platform designed to meet a variety of information management needs. In a single platform, PaperWise provides capabilities for electronic document management, records management, process automation, workflow, digital asset management, e-forms, e-mail management and collaboration.

PaperWise manages your paper documents in an exceptional manner but does much more...it manages all file types and it supports the engineering of custom interfaces and workflows.

Using its powerful engine, the PaperWise Suite can be interfaced to virtually any Windows based management or work application. This includes applications such as Accounting, Human Resources Management, Insurance Agency Management Systems (i.e. **Applied Systems TAM, AMS Sagitta**), Patient Management Systems, Legal Case Management Systems and many others...[more](#)

### **PaperWise Suite Features**

- Manages Documents, Emails, Faxes, Voice Messages
- Enables the Rapid Retrieval of all File Types
- Eliminates File Storage Requirements
- Prevents Lost Records
- Updates and Improves Work Processes

- Saves Money
- Multi-layered Security System

### **PaperWise Suite Components**

- PaperWise Server
- PaperWise Management Console
- PaperWise Workstation Client
- PaperWise Query
  - Send To
  - Print Driver
  - Workflow Toolbar
- PaperWise Displaywise
- PaperWise ImageWise
- PaperWise Dashboard
- PaperWise Workflow Suite (Build Workflows)
- PaperWise Optical Character Recognition (OCR)
- PaperWise WebWise (Web-Based Access)
- PaperWise SyncWise Server (Remote Scanning)
- PaperWise Proxy (Remote Access)
- PaperWise FaxWise (Fax Import)
- PaperWise DataWise (Direct Text Import)
- PaperWise InfoWise (Collated Data Extraction)
- PaperWise DBWise (Data Import/Export)

**The PaperWise Server** is the nucleus of the PaperWise suite of products. The Server is a set of components that work in conjunction with Microsoft's SQL server enabling the PaperWise Information Management System to be exceptionally simple to manage while maintaining its flexibility and scalability. In addition to containing the core engine from which all other PaperWise modules function, it is also comprised of unique applications that provide the fundamental operation of the system. The PaperWise Server provides:

- Unlimited system capacity
- Multi-tiered architecture
- Centralized security
- Industry standard SQL database
- Centralized management
- Flexible storage options
- Sub-second retrieval against millions of records

The PaperWise **Management Console** is a custom MMC plug-in for administrative control. PaperWise provides comprehensive archive methods based on any database parameters. Archive can move documents to any industry standard media, e.g. magnetic, optical, DVD, or CDRW. Archive purges documents based on retention policies. The management console provides access to all administrator functions including:

- System configuration
- File cabinet creation and field configuration
- Storage volume paths
- User, group, and rights administration
- Archive functions

- Database consistency checks
- Database backup and restore tools

## PaperWise Query

The PaperWise **Query** Application is the primary user interface for retrieval and indexing. Query is a feature-rich application that ensures user-friendly, straightforward accessibility to scanned documents. Query provides an extensive list of convenience and productivity features:

- Retrieves all related images, files, data, and text with a single query
- Returns a list of matching documents and presents the index information in a pick list
- Performs searches with any available index information. Supports wildcards based on user rights
- Provides complete image viewing tools including zoom in/out, zoom to area, magnifier, image rotate left/right, image fit to height/width, and invert
- Allows multiple documents to be opened in multiple windows for simultaneous viewing
- Supports multi-page documents and provides direct access to any page
- Provides document "anchors" or pre-selected zoom areas that are also accessible via hot-keys
- Supports document versioning. Original documents will always be maintained with later version having new time/date/user information connected to it
- Performs custom tasks or sequences using programmable hot-keys
- Provides full-featured image annotations while retaining original document integrity
- Provides annotation tools including multi-color: highlight, redact, block, circle, text, lines, arrows, notes, and stamps
- Returns typical images in less than 1 second in an approved environment
- Allows selection of multiple documents for print, email, or fax
- Allows queuing of documents between queries before sending entire queue to print, email, or fax
- Optionally converts selected images to PDF format for email or export
- Provides a facility to save and repeat "favorite" searches
- Provides the ability to search for text within the query results list
- Sorts results by any index field
- Arranges results columns in any order with adjustable widths
- Provides streamline indexing support for high-volume document processing
- Performs searching and indexing in a keyboard-only mode and provides keyboard short-cuts for all common tasks
- Applies notes to documents with the note author, date and time stamped automatically
- Displays and prints document overlays, uses specific overlays based on document type
- Protects index values from accidental modification while providing an efficient method for changes and updates

## Print Driver (Included with Query)

The PaperWise **Print Driver** Application enables the user to print documents directly into the PaperWise Information Management System. This provides an alternative to scanning for locally created documents and delivers unparalleled image quality.

## Send To (Included with Query)

The PaperWise **Send To** Application enables files, documents, and information to be committed to the system in the original file format utilizing integration with Microsoft Windows. The system can catalog, manage and retrieve files of any format. PaperWise is tightly integrated with Microsoft Office (2000 and later). A PaperWise Send To button is installed in each office application allowing one-touch transfer to the imaging system.

## Workflow Toolbar (Included with Query)

The PaperWise Workflow Toolbar can be designed specifically for each user or group of users. The toolbar can have an unlimited number of buttons each functioning as a specific part of the user's workflow process. Each button can execute a single function or can be designed to present the user with custom dialogs, questions, or wizards.

## DashBoard (Included with Query)

The PaperWise DashBoard is a powerful management tool that provides a customized real-time view of one or more image queues. Customizable gauges can measure and display counts of any criteria contained in the database.

- Gauges can be configured to alert in several ways when thresholds are reached
- Managers can view individual workloads at a glance
- Thresholds can trigger automated corrective actions
- Users can have visibility to upstream and downstream work load and react appropriately

## ImageWise- Scanning & Indexing

The **ImageWise** module handles scanning and inserting documents into the system. While traditional scanning of documents is not the only way to deposit information into a PaperWise System, it remains the principal method of entry. ImageWise can interface with SyncWise (optional) to accept documents from remote scanning locations over slow connections.

ImageWise supports TWAIN and Kofax scanners from all major manufacturers. ImageWise is compatible with flat beds and auto document feeders, and scans in black and white, grayscale, and color modes. ImageWise accepts files in the format generated by the scanner at the scanners' rated speed. Most scanners create TIFF Group4 images by default for black and white. Image format is dependent on the scanner capabilities; ImageWise will accept any combination of color depth, document size, or resolution.

ImageWise and Query are used for scan-time or post-scan indexing respectively. ImageWise facilitates automated indexing at scan-time while both applications provide a unique set of features developed for high production environments. The combination of local defaults, user defaults, pre-sets, hot-key shortcuts, list

histories, and image processing engines provide the most efficient indexing process in the industry.

ImageWise provides the following features:

- Full image control options – gamma, threshold, shadow, and highlight
- Name, save, and retrieve document profile settings
- Index at scan/post-scan option
- Retain field value between pages, documents, batches
- Support default field values for each scan station
- Enforce required fields
- Display every page/every *x* pages for visual QC
- Single/multi-page mode
- Batch mode
- Simplex or duplex scanning (scanner dependent)
- Bar code recognition (with optional plug-in)
- Strip leading/trailing/alpha characters from bar codes
- Discard bar code page option
- Check digit validation
- Custom mask validation
- Automatic blank page/patch page deletion
- Adjustable threshold for blank page deletion
- Zonal OCR indexing
- Apply default value if bar code read fails
- Auto rotate 90°, 180°, 270°
- Assignable hot-keys for user-defined functions or sequences
- Show/hide index fields based on user or group rights

## **DisplayWise (Application Integration)**

The **DisplayWise** module of the PaperWise product suite integrates the PaperWise system with core business software applications. Application integration provides maximum productivity for indexing; users view and process documents into the management system. When processing and data entry are complete, a hot-key will automatically pull information from the host system and apply it to the image, completing the transaction. While working in network or host-based software, the user selects pre-assigned keys to communicate with the PaperWise System. Retrieving an image from management software, AS/400, mainframe or UNIX legacy systems can be done with a single keystroke. DisplayWise eliminates data entry errors and data entry duplication.

- Allows direct access to data displayed to the screen by other applications
- Programmable hot-keys perform specific data transfer tasks
- Provides maximum efficiency for indexing
- Completely eliminates redundant data entry

## Optional OCR

PaperWise supports three approaches to Optical Character Recognition:

Zonal OCR for Scanning performs immediate OCR on a specified zone and automatically populates one or more index fields with the results. (Included with ImageWise)

Client-side OCR performs immediate OCR on highlighted areas of images or full documents. The results are available to the windows clipboard for export, pasting to another application, or for automatic indexing. (Included with Query)

Server-side OCR processes all documents in the file cabinet and builds a full text catalog for rapid search capabilities. This allows full text searches on all documents in a particular electronic file cabinet including Boolean, fuzzy, proximity, and text string searches. (Licensed separately)

## Workflow

PaperWise offers powerful, flexible workflows that are modular and portable. PaperWise scripts are used to define and enforce specific business rules. Workflow is accomplished through the use of unlimited variations of index values. Scan stations submit documents directly into workflow queues based on index values. If index views have been limited by security policies, users do not have direct access to routing fields and cannot circumvent system workflow.

- PaperWise scripts control workflow routing
- Scripts can be rapidly developed or modified by the administrative staff
- Toolbar Buttons execute defined actions or scripts
- Notification can be configured to alert users of queue activity based on sophisticated parameters such as multiple thresholds, preset numbers, or increasing/decreasing values

The **Workflow Toolbar** is commonly used to perform the required document routing. Any number of users can be pointed to a networked source for the toolbar definition file. This allows administrators to modify the master and affect all users with no traditional software deployment.

The **PaperWise Dashboard** is typically configured in a workflow environment to display the local users queue workloads and often upstream or downstream volumes. See section 3.2 Modular Design for additional Dashboard details.

The software components for workflow are included with Query. Professional service hours are required to build custom script actions and toolbars.

## WebWise (Web-Based Access)

The **WebWise** module of the PaperWise suite provides Internet or Intranet access to the PaperWise system through Microsoft's Internet Explorer web browser. WebWise allows web access to a company's files while maintaining the highest level of information security. The functionality available to the user through WebWise provides much of the same system functionality as a locally installed application. WebWise establishes global reach and maximum accessibility to the organizations documents. WebWise does not support adding images to the system or some of the advanced features of Query.

- WebWise provides the same comprehensive image viewing tools as Query

- Web users are controlled and managed by the same centralized management console as local users
- Adjustable session timeout will release idle connections and reclaim licenses
- A one-time download of ActiveX components is required for use

## PaperWise Proxy (Remote Access)

PaperWise **Proxy** is a proprietary remote technology included with the PaperWise Server that allows Windows clients to access the PaperWise database via an Internet connection. This technology eliminates the need for traditional VPN connections or leased lines between offices.

- Scan and retrieve images over the Internet without VPN connections
- Run full client versions without a dedicated network

## SyncWise Server (Remote Scanning)

The **SyncWise Server** is a processing service that allows remote scanners to operate at high speeds on slow network connections. After scanning, the images are compressed, batched and transmitted. SyncWise offers:

- A complete store and forward solution
- Support of remote production scanning
- High performance over low bandwidth networks
- Superior image compression
- Confirmed delivery to the server
- Fast import into the database upon delivery

## MFP Integration

This integration approach polls network folders and automatically pulls documents into the system. Index information is applied based on the folder name or location. Typical examples of index information gathered by this method are: "Scanned By" or "Route To". This integration allows the use of existing Multi-Function Peripherals and allows organizations to leverage their investments in these devices. MFP's offer scan access to all users and are suitable for occasional use.

## FaxWise (Fax Import)

The **FaxWise** module of the PaperWise suite of products provides for automatic import of faxes into the Information Management System. FaxWise works in conjunction with many mainstream network fax appliances and presents the image directly to PaperWise work queues. Indexing information is applied based on the line or extension where the fax was received. This approach achieves superior image quality and provides a true paperless solution to bulk fax processing.

## DataWise (Direct Text Import)

The **DataWise** module provides Electronic Report Management (ERM) and the seamless migration of text data to the PaperWise system. DataWise accepts text files, Computer Output to Laser Disk (COLD), or print jobs directly from host applications including mainframe, UNIX, AS/400 or DOS. Instead of pushing this data to the printer, send it directly into the PaperWise system.

During import, text files are automatically indexed and formatted, and optionally overlaid with an electronic "form". This makes digital reports or checks identical in appearance to printed copies.

Configure a new job in minutes without custom programming. The configuration wizard assists with defining page breaks, while drag-and-drop color-coded text makes it simple to extract index data. DataWise previews the output for quick and error-free layout.

- Schedule automatic import of data into the system
- Format text and layouts according to defined templates
- Apply overlay for "pre-printed form" appearance
- Comprehensive security controls access to sensitive information
- Ideal for daily reports and record of check runs
- Automatically publish daily reports to all users without printing and distribution costs

## **Infowise (Collated Data Extraction)**

**InfoWise** is a search and processing engine that uses customizable queries to extract and collate documents from the PaperWise system. Collation options organize related documents in logical groups, eliminating the need to manually search for, retrieve, and arrange documents. InfoWise prepares these collated documents for processing, including billing, invoicing, bulk printing, and check runs. Sophisticated output options allow you to control costs by automatically scaling and rotating images to fit 1, 2 or 4 images per page. Create custom overlays to apply to text data eliminating costly preprinted forms. Sort documents in any order or by any index field.

- Improve payment turnaround by providing all required documentation automatically
- Streamline print runs and customize output for each client
- Eliminate labor costs to manually sort and copy
- Extract related data from multiple information sources
- Configure a job once and schedule automatic output forever
- Reduce postage fees by automatically printing postal bar codes by ZIP code sorting

## **DBWise (Data Import/Export)**

The **DBWise** module of the PaperWise Information Management System is a tool for migrating information from the PaperWise database to other business applications or databases. The extracted database information is located through a query process created in DBWise. After the query is executed and the desired information is defined, it can be exported to an XML file containing the data, or a comma-delimited text file. Data may also be transferred directly from the PaperWise database to another database. Whether using direct transfer or exported files, DBWise leverages the information stored in a PaperWise Information Management System.

## **Workflow Suite (Version 6.1)**

PaperWise powerful new approach allows designers to rapidly build workflows that drive business process with drag-and-drop ease. Pull process steps onto a drawing canvas using the Workflow Editor to design your workflow. Connect process and

apply business rules or logic criteria to the connections. When the “flowchart” is completed, simply select ‘publish’ to put the process into production.

- Workflow Editor provides workflow design and modifications
- Electronic Forms Editor allows the rapid construction of electronic forms for data collection and approval
- Rules Based Routing supports complex decision criteria and multi-path routing
- Workflow Version Control allows easy testing and roll-back of complex workflows
- Workflow Inbox is the primary work area while providing each user a personalized view of their pending and completed tasks

## Security

PaperWise provides exceptional flexibility and control over document access and system features with a multi-layered security system.

### Database Security

PaperWise provides its own integrated security and does not rely on Windows security. Windows Administrators do not necessarily have administrator rights to the PaperWise system. The PaperWise security model is based on users and groups, file cabinets, and query restrictions and is enforced at the database level.

### Image Security

PaperWise stores images in their original file formats wrapped and compressed in proprietary containers. Any attempt to modify the container invalidates the images making the system suitable for non-repudiation. The storage files are unreadable outside the PaperWise application. Once committed to the system, documents are not modifiable without resubmitting to the system. This avoids any question of document authenticity and provides a natural audit trail.

### Tracking and Reporting

PaperWise is capable of tracking detailed activities including logons, retrievals, modifications, deletions, and security changes. These extensive logs are available for administrator export and inspection.

### User Rights

Access is controlled by user name and password. File cabinet rights are assigned at the user or group level. File cabinet rights provide generic rights such as View, Modify, Delete Images, and View, Modify, Delete Notes, as well as View and Delete annotations.

### Data Access

Query restrictions apply controls based on individual field values such as account number, document type, queue status, or even date ranges. This allows specific security control down to individual document access.

## Feature Security

Individual feature access can be granted or declined based on user or group rights. Approximately 50 functions can be hidden from view or disabled on menus. A common example is disabling all print, email, and export capabilities. This can allow efficient use of the system in a view only mode, but does not allow any information to be extracted from the system for unapproved use.