DocRecord™

Improve Operational Efficiencies with All-Inclusive ECM

ADVANCED CAPABILITIES

Automating the processing, storage, and retrieval of your documents and data

With DocRecord, its all-inclusive enterprise content management capabilities provide significant operational efficiencies. These efficiencies yield substantial and immediate savings in labour and other expenses. These increased efficiencies also allow significantly faster response time to both customers and employees.

prism
software

About DocRecord

Unlike other enterprise content management applications, Prism's DocRecord is an all-inclusive ECM application that is priced by the concurrent user. Each DocRecord concurrent user gets complete access to all the core advanced features of DocRecord including:

» On-Demand, Instantly Available Documents & Content

» Automated Capture and Data Extraction & Filing for Documents and Data

» Workflow and Automated Document Processing

» eForms for Data Collection and Processing & Automated Forms Creation

» Network Folder Migration into DocRecord

» Automated Document Creation in Workflow

Simply Priced by Concurrent User

DocRecord is an all-inclusive application that is priced by the concurrent user and not by the architecture or capabilities. Essential key features and capabilities, usually priced separately in other enterprise content management (ECM) applications, are included in the core DocRecord application. This keeps costs low, both at the time of purchase and over the life of the product.

And, since everything is included it's easy to determine your organisation's implementation requirements. These core product capabilities and features are what organisations require to eliminate manual processing and provide instant, anywhere-access to their content. Anywhere records-access includes all the ways you work: Over the web, integrated with Microsoft Outlook and Word, through third-party applications, or with a dedicated desktop application.

All-Inclusive Core Application of DocRecord

BENEFITS OF ECM WITH DOCRECORD

» Instantly searchable and accessible documents and content from any browser-enabled device

» Automated recognition and filing of documents into correct folders with extracted metadata

» Customisable automated workflows replace manual document processing

» Automated accounting, HR, legal, and other departmental document processing

» Easy data capture and workflow processing with DocRecord's eForm

» Access DocRecord data from other line-of-business applications

» Significant improvement in employee and customer response times and more

FOR ALL INDUSTRIES

» Manufacturing & Distribution

» Healthcare

» Legal

» Education

» Government

» Banking & Finance

» HR

» Operations

» Accounting

RANGE OF ACCESS & DATA INPUTS

An organisation needs to provide their employees with instant and secure access to its important documents, records, and other content. And, they need this access anytime from nearly any device. DocRecord provides multiple access methods for clients to match their access requirements at that moment.

Desktop Users

DocRecord provides a Windows-based desktop application that provides the full power of DocRecord, including:

- » Quick & Intelligent Search
- » Workflow Integration
- » Document Preview
- » Indexing and Metadata
- » Annotation & PDF Document Markup
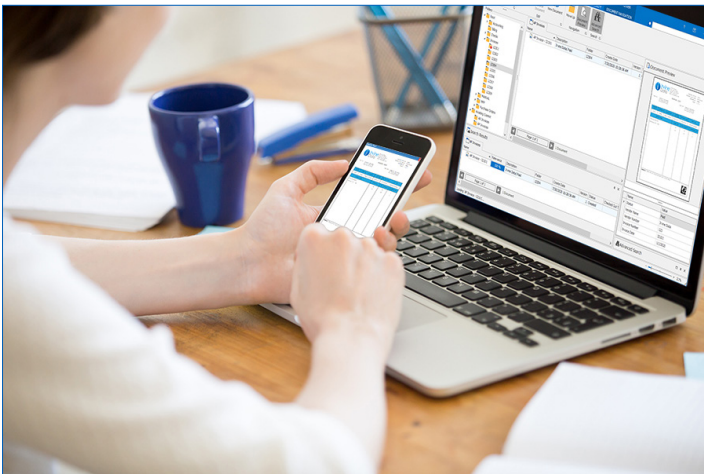
Powerful Desktop & Web Client

Mobile & Browser Users

Both remote and on-the-go workers need to access both records and workflows. DocRecord provides a Web Client, a browser-based application that scales for most sizes of mobile devices. Users can access, retrieve, and deposit records into DocRecord folders. They can also access and process their workflow tasks. Using Web Client, users can annotate PDFs and process documents. This allows workers to stay a part of the organisation's critical workflow.

Microsoft Office Users

DocRecord is also fully integrated from within Microsoft Office applications Outlook, Word, PowerPoint, and Excel. Within each of these Office applications, DocRecord users can access, retrieve, and deposit records into DocRecord folders. This comprehensive Microsoft Office integration allows users who work primarily within these applications to not have to switch to other screens or applications to complete their work. This saves valuable time and processing steps for those Office-centric users.
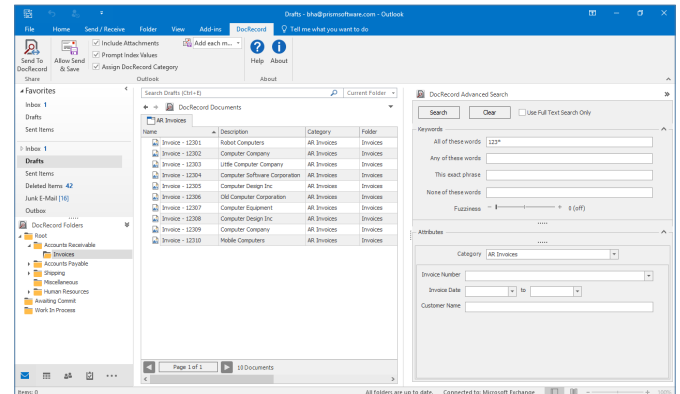
Stay productive by never leaving applications

Application Extender

Many users need to access ECM records while utilising another line-of-business (LOB) application such as accounting, ERP, or CRM. For these users, DocRecord allows direct access to its records from within the LOB application. No programming is required and set-up is easy. Your organisation will be up and running in no time.

Quick Indexing Users

Some organisations process large amounts of non-standard formatted documents that require manual indexing and adding of metadata. These documents - generally correspondences and notes - are scanned records. Since they are a non-standard format, automatically extracting metadata is often difficult. DocRecord's quick indexing capability allows users to easily add this missing index information and then quickly file into DocRecord.

AUTOMATED CAPTURE & INTELLIGENT EXTRACTION

DocRecord provides a powerful and easy-to-use Capture capability that allows documents to be automatically recognised, have data extracted, and filed into its repository.

Line-Item Data Extraction

DocRecord's Capture engine allows for intelligent and automated line-item data extraction from electronic documents. This allows organisations to eliminate manual keying of critical data into other applications such as accounting or ERP.

The extracted data can be automatically compared for a data match to a database and data exceptions can be either approved or corrected by a person reviewing the information.
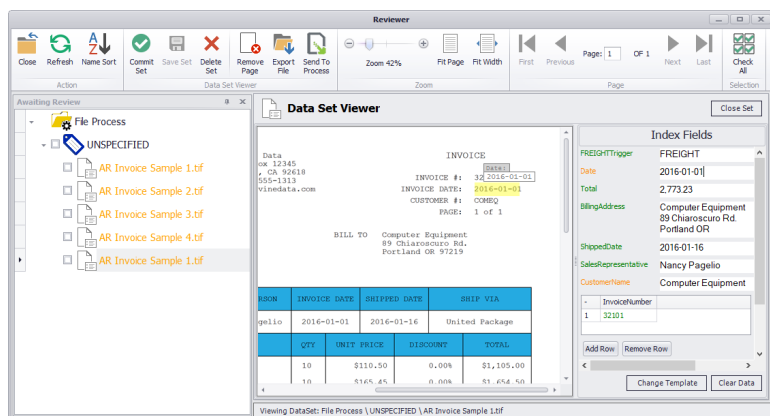
Simply mouse-over any text on the page and the metadata is automatically set
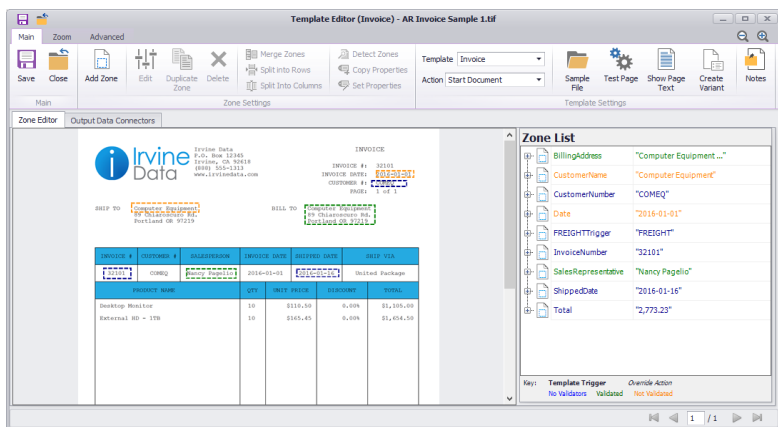
Automatically create numerous zonal-based templates to quickly process your documents

Smart Templates

Smart Templates, a feature of DocRecord's Capture, are included and eliminate the need to create numerous templates for processing your documents. Smart Templates allow document information (metadata) to be automatically and dynamically recognised and extracted based on known text triggers - such as the words "Total" or "Customer" - or on data patterns within a given document type such as an invoice or check.

Automatic Translation

DocRecord's Capture can automatically translate the extracted data into 60 languages. It does this through Microsoft Translator, a Microsoft Azure service which the user sets up separately. The benefit of automatically translating data is that it saves time over manually translating line-item data.

Click Indexing

Continue to improve operational efficiency by using Click Indexing which enables the user to simply "mouse-over" any text on the page and, with a mouse click, add that value to the set of extracted data.

BUSINESS PROCESS AUTOMATION

Automating and streamlining business processes provide substantial cost savings by eliminating manual tasks and greatly speeds the delivery of data and content to those that need it.

Workflow for Document and Data Processing

DocRecord users can easily create automated processes linking people and data. These processes provide a wide range of functions to replace manual processing.

The Workflow Designer allows the user to create workflows through its intuitive drag-and-drop graphical interface. Users simply drag the process task icon to the workspace to create as simple or comprehensive automation as required.
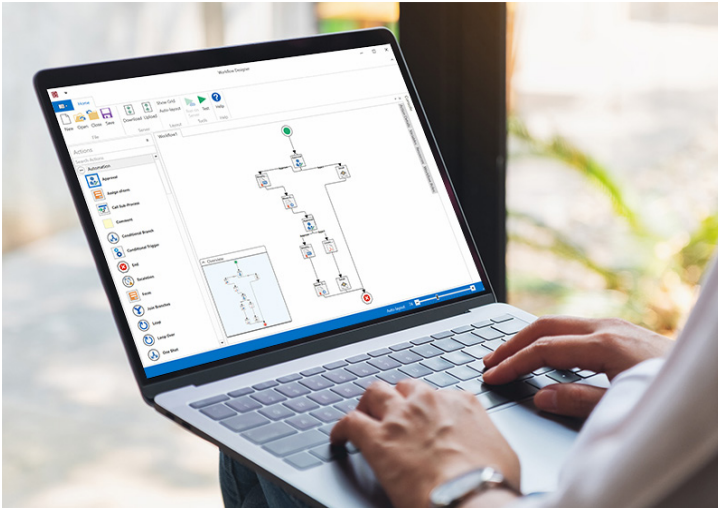
Easy-to-build work lows using drag-and-drop user interface to customise processes

Document Creation in Workflow

DocRecord's Workflow function also allows for the automated creation of advanced documents. Documents – such as statements and invoices, customer notifications, delivery instructions, and other items – exist as a customer-created template in workflow. These highly personalised documents are formed within a Workflow process. And the variable data-driven documents are created rapidly and can utilise conditional database items such as customer information, text items, text sections, graphics, and can dynamically create charts and table fields. These documents can be multi-page and automatically control white sectioning and multi-page flowing.

DocRecord's integrated Workflow enables the conditional output of documents based on data. The input data is from a wide variety of sources to automate this document generation. Create customer-changing barcodes, images, messaging, and much more. Automated document creation in Workflow is designed for high volume statement and document production printing.

DocRecord API

With its RESTful web services API, DocRecord's content repository can be accessed or searched with any third-party application.

Network Folder Migration

The organisation's existing network folder system can be accessed through DocRecord. It does this by duplicating and then subsuming all the folders and files in the network folder system. Your new network folder system is duplicated within DocRecord. Any new files created outside of your new DocRecord folder migration are also imported into DocRecord. All imported folders and its documents have all the DocRecord features such as advanced security, check-in and check-out, audit trail, versioning, retention policies, and much more.

Automated Forms Creation with eForms

The easy collection of data, such as user information from a web page, is critical to many workflows. With DocRecord's eForms capability, organisations can build a wide range of different form types to collect such data from mobile and desktop platforms.

eForms vary widely by purpose, type, complexity, and display platform. DocRecord's eForm Designer provides a user interface to quickly design and preview your complex eForm. Quickly build a library of different types of eForms for collecting and processing data.
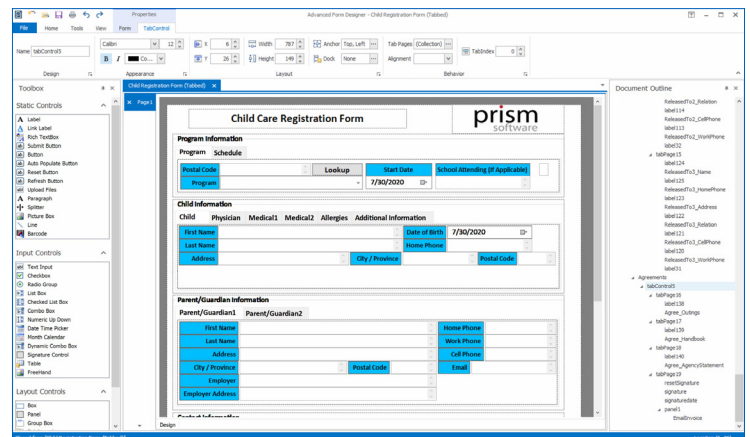
Quickly design and preview complex eForms using DocRecord eForm Designer

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