

**Do you know what POD's are outstanding?  
What's their value?  
Can you immediately send a copy to a customer via email or fax?**

**With DocPOD you can!**

## **DocPOD's Design Philosophy**

Document Management can be divided into 4 broad categories within which various operations can take place.

Not one of the categories is more important than another. It is no use managing documents which you can't find, neither is it any use capturing documents that you can't manage properly.

What is required is a synergy in which all (or as much as is practical) information is captured. This information must be stored in a way that is easy to understand. Retrieval must be simple and available to many locations. Once it is retrieved it must be distributable using standard Windows procedures (i.e. print, fax email, CD-ROM).

### **Category 1. Capture**

This encompasses the various methods necessary to get the information into the Management system.

Capture can be divided into 2 broad groups: - **Capture and Scan** and **Prelist Capture**

**Capture and Scan** is the standard system in which as each signed POD is received the relevant information is input after which the document is scanned. WE DO NOT RECOMMEND THIS METHOD AS IT IS TOO LABOUR INTENSIVE. Having said that DocPOD can operate this way if required.



**Figure1. Document scanned and indexed with the operator entering all the information about the document**

**Prelist Capture** allows for information about the document to be entered before the signed document is received. This is normally achieved by the Accounting system exporting a file in any format containing the document number, date, customer account number, Customer name, the branch and optionally the value of the POD. When the signed POD is received all that is required to index it is to enter the document number which will be tested against the prelist and then scan the document. This has obvious benefits such as ensuring that a document is not duplicated as well as highlighting documents which have not yet been signed. Prelist capture has the added ability to import information about documents from accounting systems reducing input times and potential transcription errors.



Figure2. Starting a Batch Scan

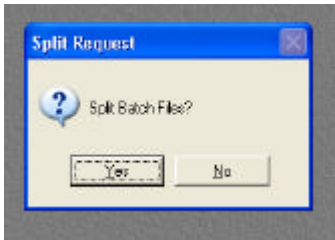


Figure3. After the batch has been scanned



Figure4. Indexing Setup screen



Figure5. You can set the zoom in on each document to Index as well as the predetermined position on the document number which is all that is needed to index the document

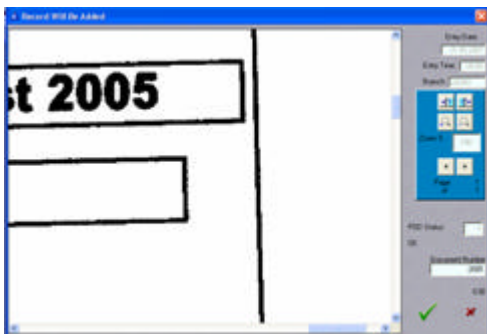


Figure6. Document being indexed. Zoom in on the document number, enter the number (2005) and press enter.

The Remote capture system allows the capture of documents offsite. The central POD server polls the remote sites over a WAN/LAN and moves any valid scanned documents into a folder called EXBRANCH. These documents are then integrated into the POD system automatically

### **Category 2. POD Management**

What can we do with, or to, the document whilst it is stored in the POD system.

This encompasses the ability to find a document change information about the document. The image itself can be re-scanned and added to, the pages within the document can be moved and rotated.

### **Category 3. Retrieval**

How can we find a document that we need?

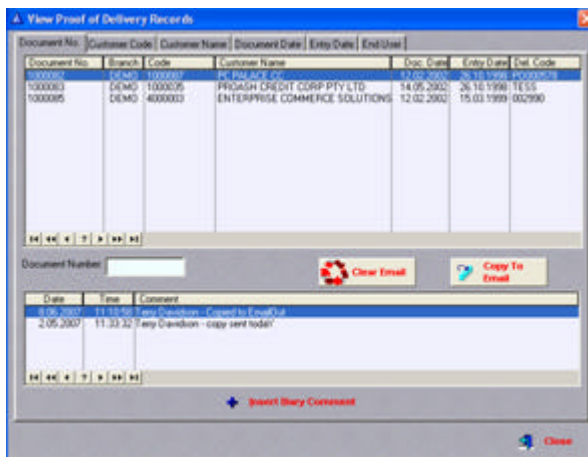


Figure7. Select by various criteria and double click the selected document

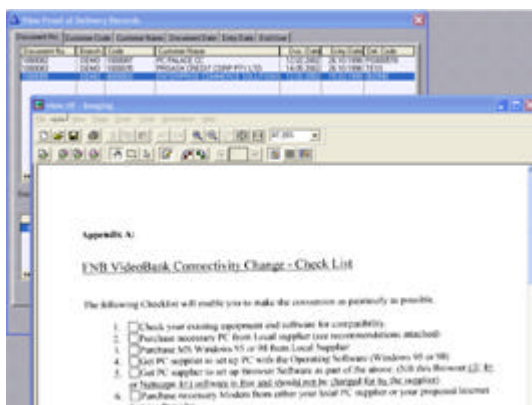


Figure8. Displaying the selected document

Any document can be found by any, or a combination of, the following view options.

**By Document Number**

Documents are listed alphanumerically. Type in as much of the document number as known and a list corresponding to the number entered will appear. Double-click on the document to view.

**By Customer Account Code**

Select the customer code from the list. Only document for that customer will appear. Double-click on the document to view.

**By Customer Name**

Type in as much of the Name as known and a list corresponding to the Name entered will appear. Double-click on the document to view.

**By Document Date or Entry date**

This displays all of the documents within the system in date order, oldest first. Clicking the document displays the document itself.

**Category 4. Dissemination**

Once we have the document what can we do to give it wider coverage?

Once the document is viewed the following options are available depending on the hardware installed.

**Print the document** or a range of pages

**Fax the document** (if an internal computer fax system is installed.)

**Email the document** if you have an email program installed (Microsoft Express Outlook etc.)

A further feature is the ability to **create a CD complete with document viewer for a selected client over a specified period**. You select the client from a list, enter a start and end date. This will create a directory on the system named after the clients account number, and copy into the directory all documents with their specific associated search files and the Document Viewer.

Once the job is complete the directory can be copied to CD using any writeable CD system.

The above is an overview of DocPOD POD but additional features are being added all the time. For example, in production at the moment is a DocPOD specific backup system which will incrementally back up all the files at preset times.

We rely on our customers to tell us of any improvement to the system that they regard as significant. We assure you we listen very carefully.