



**Square 9**  
Softworks



## ***Are your paper files growing on you?***

A report from the University of Texas Center For Research on Information Systems stated:  
disaster:

“While many companies have some type of disaster recovery plan in place for business data, the overwhelming majority has not taken similar precautions to protect their mission critical documents.”

***Do you want an easier way to manage and protect your paper files?***

***Why aren't you managing many of your documents digitally?***

***Introducing:***

**Smart  
Search**

***What are the benefits of scanning documents?***

***How do you get a solid ROI?***

- ❖ **Protect important documents** – by having a digital copy.
- ❖ **Reduce filing time and costs** – reduce labor expenses for filing documents.
- ❖ **Access needed documents in seconds** – to save time and improve service levels.
- ❖ **Enable quick access by multiple users at a time** – versus retrieving paper from filing cabinets.
- ❖ **Eliminate misplaced or misfiled documents.**
- ❖ **Reduce copying costs.**
- ❖ **Reduce mailing costs** – send documents via email.
- ❖ **Reduce space consumed by filing cabinets & reduce storage costs.**
- ❖ **Improve document security.**

**What makes *SmartSearch* different than just scanning documents into a file folder on a user's computer or on a shared server?**

Many people have started using their office MFPs (Multifunction Peripherals – office devices that copy, scan, print and fax) or a small scanner to scan documents into file folder(s) on their computer or on a shared server. While this is a good starting point for storing a smaller number of document image files, there are a number of issues associated with this approach as document volumes grow.

The cost effective **SmartSearch** document management system employs a Microsoft SQL Express database - to easily organize and relate documents. **The SmartSearch advantages include:**

- ❖ **Documents can be described (index fields) with multiple values versus a single file name.**
- ❖ **Automated indexing & filing** – to simplify the document scanning and filing process.
- ❖ **Pre-defined index values enforce consistent formatting, naming and filing conventions.**
- ❖ **Documents can be easily retrieved via simple “queries”.**
- ❖ **Documents can be easily related (cross referenced).**
- ❖ **Retrieving and viewing documents is much faster and easier** – versus opening and closing viewer tools (e.g. Adobe or MS Tiff image viewer).
- ❖ **Improved security and compliance (e.g. HIPAA, GLB, FACTA, etc.)** via archive security settings and an audit trail – to track access and usage of a document, by user.

**SmartSearch can automate the filing of your scanned documents** - InfiNet Business Systems offers a number of software features and “tools” that can fully automate the scanning and labeling (indexing) process – so all one needs to do is place documents in a scanner and let them fly through. They would then be indexed and filed for you automatically. We offer a variety of methods such as using advanced tools for bar code recognition, optical character recognition (OCR) and database integration tools to connect with your line of business system where the data associated with a document may already reside.

### **Why would the ability to relate or cross reference documents be important?**

When finding information contained within documents, users often need to see many related documents. For example, you may want to find all documents related to a purchase order such as a packing list, an invoice and shipping documents (three way match) – or all documents related to a sales order such as a customer’s purchase order, specifications, your invoice, etc. A user may want to find all documents for a specific client or a subject matter – or find specific document types (e.g. contracts) for a client – or find needed documents for a client for a specific date or date range.

### **Advanced Security – and why it is important.**

If an organization is placing scanned documents (and other digital document files) into a folder on a shared server, these digital files typically become far less secure. Unless advanced security settings are set up, any user who can access a shared folder can typically delete documents, copy documents and/or export documents. Many organizations have a concern about having someone leave their business and taking important information with them.

With SmartSearch, it is easy to set rules about who can access an archive (a document category such as human resource files). It is easy to set permissions so some users may only view files but they cannot delete, copy, print, email or export document files. There is also a detailed audit trail that will provide information about who accessed documents (date and time stamped) and what actions they may have taken with a document image file.

The **SmartSearch** document management system is intuitive and easy to use.

**Inboxes – where scanned documents can be placed prior to indexing**

**Archive categories - where documents are stored and secured**

**Easily view the index values of recently archived documents**

Employee Name	Employee Number	Date of Hire	HR Doc Type	Date of Termination	Status
Raven Broomstick	202-40-9970	10/31/2002	W-4	03/31/2006	Inactive
Raven Broomstick	202-40-9970	10/31/2002	W-9	03/31/2006	Inactive
Raven Broomstick	202-40-9970	10/31/2002	Handbook Acknowledgement	03/31/2006	Inactive
Raven Broomstick	202-40-9970	10/31/2002	Emergency Notification	03/31/2006	Inactive
Raven Broomstick	202-40-9970	10/31/2002	Direct Deposit	03/31/2006	Inactive
Raven Broomstick	202-40-9970	10/31/2002	Application	03/31/2006	Inactive
Michael Waters	123-65-0010	01/05/2005	Handbook Acknowledgement	03/01/2005	Inactive
Michael Waters	123-65-0010	01/05/2005	Emergency Notification	03/01/2005	Inactive
Michael Waters	123-65-0010	01/05/2005	NDA	03/01/2005	Inactive
Michael Waters	123-65-0010	01/05/2005	W-9	03/01/2005	Inactive
Michael Waters	123-65-0010	01/05/2005	Direct Deposit	03/01/2005	Inactive
Maggie May	292-40-0123	04/09/2005	NDA		Active
Maggie May	292-40-0123	04/09/2005	Application		Active
Maggie May	292-40-0123	04/09/2005	W-9		Active
Maggie May	292-40-0123	04/09/2005	Direct Deposit		Active
Maggie May	292-40-0123	04/09/2005	Handbook Acknowledgement		Active
Maggie May	292-40-0123	04/09/2005	Emergency Notification		Active
Lawrence Loose	191-27-0090	09/27/2001	Emergency Notification		Active
Lawrence Loose	191-27-0090	09/27/2001	Direct Deposit		Active
Lawrence Loose	191-27-0090	09/27/2001	Application		Active
Lawrence Loose	191-27-0090	09/27/2001	Handbook Acknowledgement		Active
Lawrence Loose	191-27-0090	09/27/2001	W-9		Active
Lawrence Loose	191-27-0090	09/27/2001	W-4		Active
John Otto	76-54-3776	12/12/2006	Application		Active

**SmartSearch** makes it very easy to find a document - or several related documents via simple queries. This means needed documents can be retrieved and viewed quickly and easily.

**Examples of queries:**

Retrieve a specific invoice from Vendor ABC

Retrieve all the invoices from Vendor ABC - for a date range.

Retrieve all the documents related to a purchase order (e.g. po, packing lists, invoices).

Retrieve all documents for a client, for a project, for an employee or for a vendor, etc.

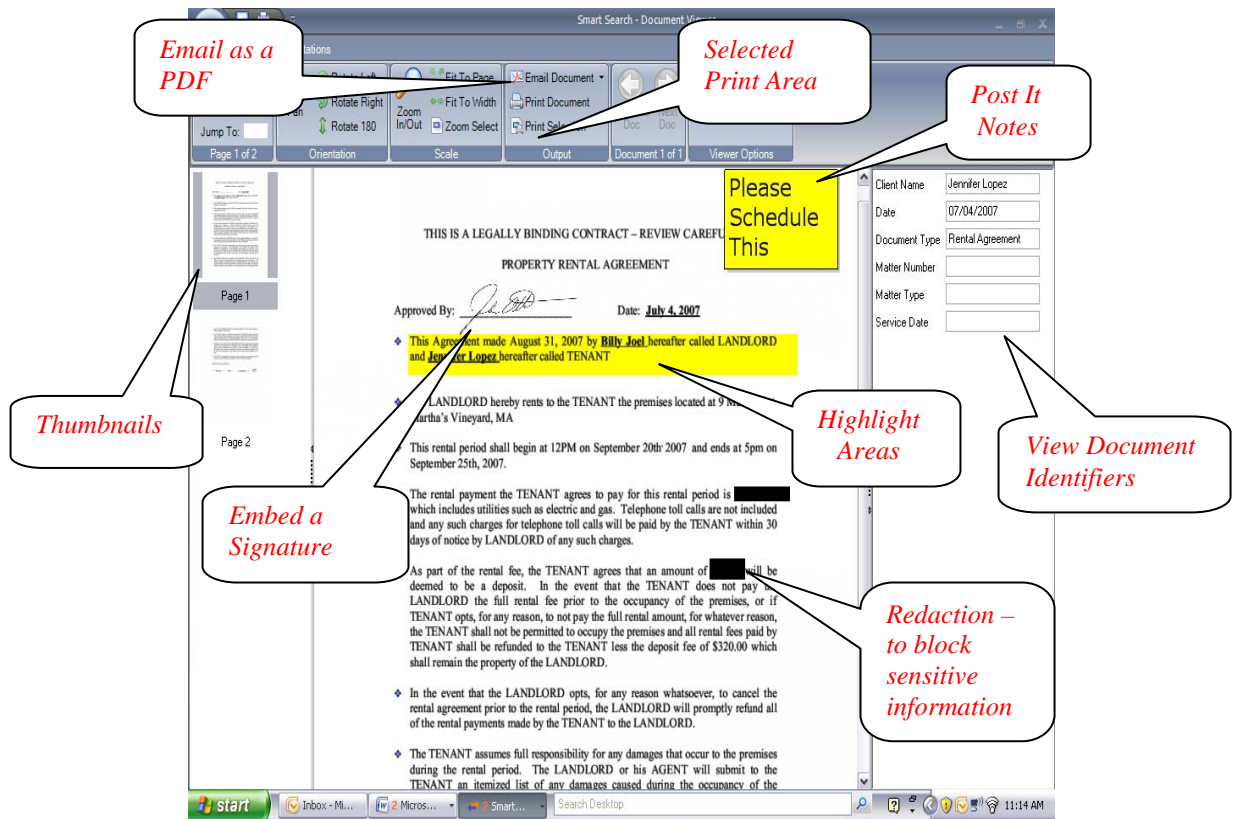
Retrieve selected document types for a client, a project, an employee or for a vendor, etc.

**Use Simple Queries to locate documents**

Vendor Name	Document Type	Invoice Amount	Invoice Date	Invoice Number	PO Date	PO Number
UBS Copiers	Purchase Order	\$7,500.00	02/12/2007	559		
Stanford C...				602919	11/25/2006	2002
New Haven				10501		
New Haven				10125		
New Haven				11211		
New Haven				10894		
New Haven				11421		
New Haven				803		
New Haven				1021		
New Haven				803		
New Haven				2011		
New Haven				990		
New Haven				10125		
New Haven					12/05/2006	1777
New Haven					12/08/2006	1402
New Haven					12/04/2006	3005
New Haven					12/09/2006	1221
New Haven	Ping List	\$12,000.00	12/09/2006	1221	12/09/2006	1221
New Haven	Purchase Order				12/08/2006	2257
New Haven	Ping List	\$17,500.00	12/08/2006	2257	12/08/2006	2257
New Haven	Ping List	\$12,000.00	12/08/2006	588992	12/08/2006	1402

Once a document has been retrieved, the *SmartSearch* viewer provides many useful tools.

### SmartSearch Viewer Tools.



Let us show you how easy and cost effective SmartSearch can be.