



DocMinder™

Document Reminder System
- Patent Pending -

Do you live and die by your calendar?

Word-Tech's DocMinder™ Document Reminder System marries your documents to your existing e-mail system.

This affordable user-friendly system allows the correct individual to receive an automatic e-mail with the correct document attached at the correct time in the future with instructions on the correct action to take. The e-mail can also contain approved follow up forms and a check list of steps to take.

By simply right clicking on a document, you can bring up a list of events associated to that document. **Simplicity is the key!** If it's easy, it is more likely that users will enter the proper information.

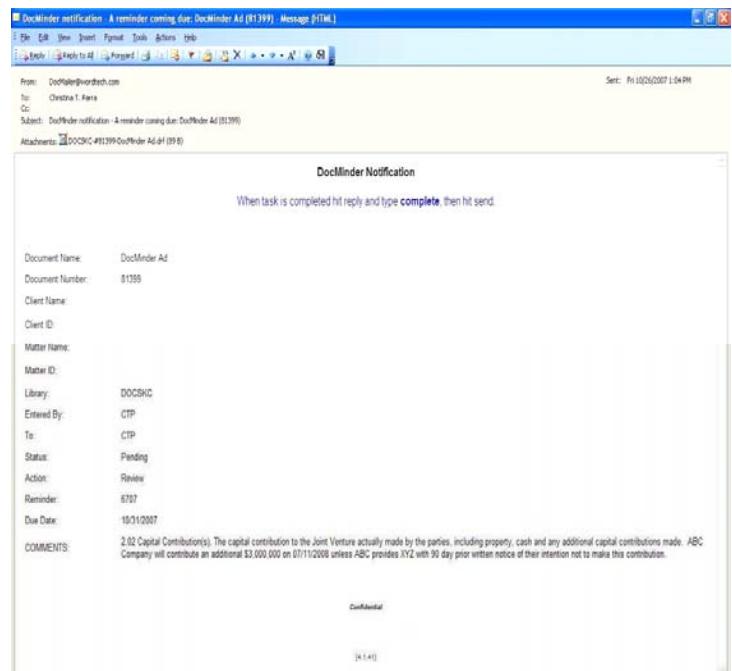
Potential Business Applications

- Contracts with renewal dates, milestones, etc.
- Litigation dates and/or tasks to track
- Periodic document review (i.e. Sarbanes Oxley)
- Maintenance and/or warranty review
- Human Resources updates (employee reviews, benefit reminders)
- Lease and Real Estate transactions
- Insurance policy management
- Claims management
- Patent and Copyright management
- Correspondence management

Features & Benefits

- Reduces costs and risks from missing critical dates, not following up with correct forms or following the correct steps.
- Automatically e-mails to alert responsible parties or departments of upcoming events.
- Allows for supervisors to be alerted of upcoming reminders as well.
- Fulfill Sarbanes Oxley compliance re: periodic document reviews.
- Reduce risk of picking the wrong version of the document when critical dates come due.
- Integrates with your document management system and most popular e-mail systems.
- Creates reports on pending events/activities with proper documents by individual, department, etc.
- Reduces issues from personnel turnover.

Sample Reminder E-mail





Sample Screen Shots

Once in your Document Management system simply right click and choose DocMinder option

Fields can be customized to meet your organization's specific requirements

The screenshot shows a Document Management System interface. At the top, there is a menu bar with options like File, View, Favorites, Document, Search, Folder, Workspaces, Options, and Help. Below the menu is a navigation bar with buttons for Back, Forward, Search, and Folders. The address bar shows the path: DOCSKC\Quick Searches\81937. The main area displays a table of documents with columns for Edit Date, Doc #, Document Name, Application, and Author Name. A document with Doc # 81937 and Document Name Jones Co. Building P is selected. A right-click context menu is open over this document, with the DocMinder option highlighted. A red arrow points from this menu to a second screenshot of the DocMinder interface. A large blue arrow points from the first screenshot to the second.

The second screenshot shows the DocMinder interface for a document titled "8484 Y:\Docs\Joint Venture Agreement.DOC". It includes a menu bar (File, Edit, View, Tools, Help) and a header section with fields for To (Bruce Karlson), Cc (Gary Walker), and Bcc. A Comments section contains text about capital contributions. Below this are sections for Attach As (with checkboxes for Link, Copy, Outlook), Reminder Functions (Due Date: 11/05/07, Recurrence, Notifications, Show Parent Reminders, Expanded view), Client/Matter (Lookup), and Reminder Status (Status: Pending, Action: Review). At the bottom, there is a table titled "Currently viewing parent reminders" with columns for Recurrence, Recurrence List, Notifications, Due Date, Complete, and Comments.

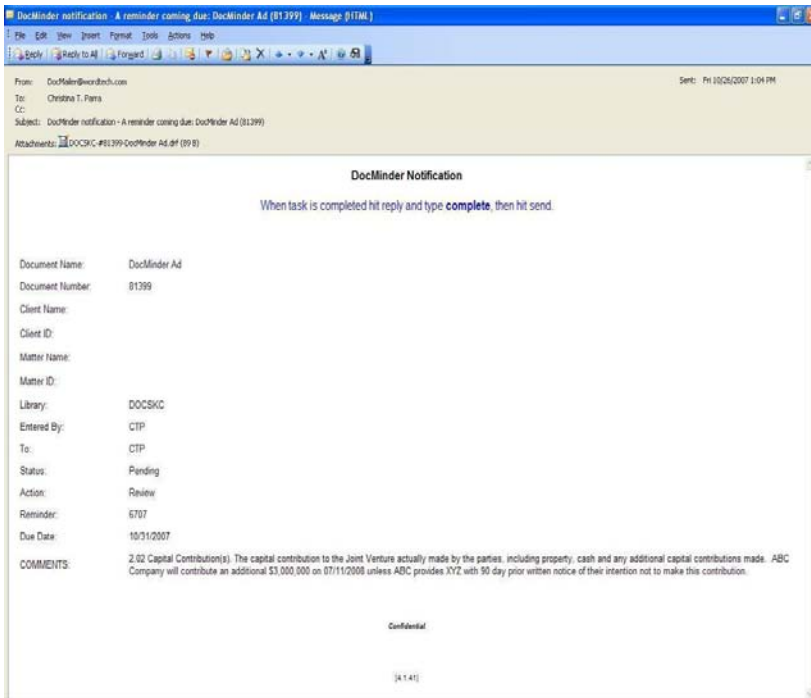
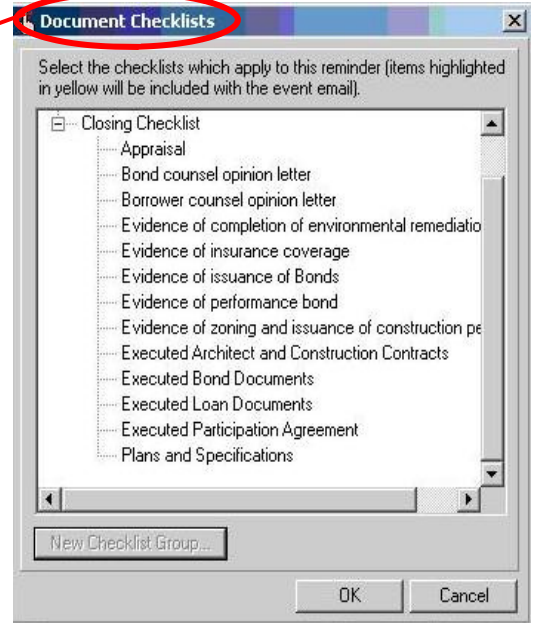
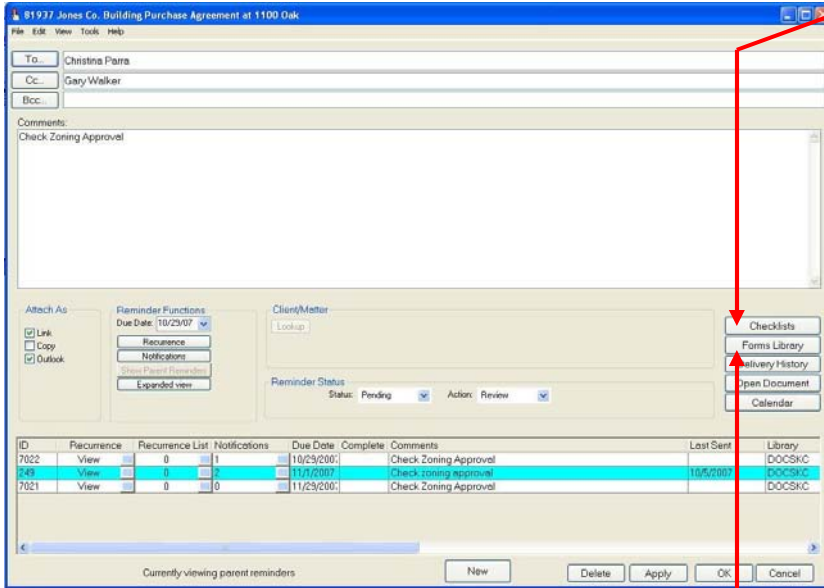
Recurrence	Recurrence List	Notifications	Due Date	Complete	Comments
View	0	4	4/17/2008		ARTICLE IV
View	0	0	11/5/2007		2.02 Capital Contribution(s). The capital contribution to the Joint Venture actually
View	5	3	10/23/2007		Review insurance clause

Add or Edit a new event with reminder email



Adding or editing a reminder with attachments

A checklist can be added to the e-mail reminder to direct your staff to complete all tasks.



The proper follow up forms can be attached to the e-mail with the original document.

An e-mail containing the original document, follow up forms, and a checklist of tasks to be completed can be sent to the proper individuals, with reminders until completed. All the user needs is an email address and can complete the task within the email itself.

Filter by individual, department or everyone.

Uncompleted and Completed Reminder Reports

- PATENT PENDING -



Both uncompleted and completed reminder reports can be sorted by date range, individual, group, client, matter, etc, with an option to output the results into Excel.

ID	Recurrence	Recurrence List	Notifications	Due Date	Complete	Comments	Last Sent	Library
7022	View	0	1	10/23/2007		Check Zoning Approval		DOCSK
7021	View	0	1	11/23/2007		Check zoning approval	10/6/2007	DOCSK
7021	View	0	0	11/23/2007		Check Zoning Approval		DOCSK

Open and view document



View upcoming reminders report.

ID	Client	Matter	Document Name	Due Date	Notification Date	To:
6616	ADVANCE STORES COMPANY, INC.	Johnson Contract	Joint Venture Agreement	11/16/2007	11/13/2007, 09/16/2007, 11/02/2007	Bruce Karl
6758			Bed Bath & Beyond - Trial Install	10/30/2007		Matt Moige
6759			Bed Bath & Beyond - Trial Install	10/30/2007		Matt Moige
6890			Contract Mgmt Consultants - Review NDA's Received	11/8/2007		Bruce Karl
6822			Fisher Patterson Sample Documents FORM12	11/1/2007		Randy Rat
6824			Y:\Docs\Joint Venture Agreement.DOC	11/5/2007		Bruce Karl
6572			Y:\Docs\Master WTBS Terms and Conditions Document (6_5_01).DOC	11/1/2007		Bruce Karl
2361			Skills Inventory	10/26/2007		Bruce Karl
2315			Master WTBS Terms and Conditions Document (6/5/01)	11/7/2007		Bruce Karl
6584			WTBS Records Management Seminar Slides	11/14/2007		Bruce Karl
6707			DocMinder Ad	10/31/2007	10/30/2007, 10/24/2007	Christina P.
2253			Jones Co. Building Purchase Agreement at 1100 Oak	11/12/2007	10/31/2007, 10/23/2007	Bruce Karl
7022			Jones Co. Building Purchase Agreement at 1100 Oak	10/29/2007	10/28/2007	Christina P.
2230			DocMinder quote for Kirton & McConkie	11/2/2007		Bruce Karl
6581			Microsoft TechNet subscription, expires 11/07	10/30/2007		Bruce Karl
7012			American Angus - Signed Agreement Order Packet	10/26/2007		Jim Tipton
6553			KKWC modifications quote	11/5/2007		Bruce Karl
6546			DM Software Agreement.doc	11/12/2007		Bruce Karl
6033			4.0.6 screen shot of errors, 9/3/07	12/17/2007	12/14/2007, 11/17/2007, 12/03/2007	Bruce Karl
6025			4.0.8 new test document, evening 9/4	12/17/2007	12/14/2007, 11/17/2007, 12/03/2007	Bruce Karl
6359			4.0.11 testing 9.6 PM	12/20/2007	12/17/2007, 11/20/2007, 12/06/2007	Bruce Karl
6560			NCMA Contract Mgmt Consulting 9-27	11/6/2007	11/5/2007	Christina P.
6560			NCMA Contract Mgmt Consulting 9-27	11/6/2007	11/5/2007	Christina P.
6844			Community National Bank - Test Extract	10/29/2007		Jim Tipton
6983			stuff to delete	10/26/2007		Jim Tipton
6596			Confidence Seminar	10/26/2007		Randy Rat

View Range Selection: Due Date Notification Date
Next: Week Month Quarter
From: 10/26/2007 To: 02/20/2008
Buttons: Filter Users, C/M Filter, Show, Print, Print To File, Done

53530 Master WTBS Terms and Conditions Document (6/5/01)

File Edit View Tools Help

To: Bruce Karlson
Cc:
Bcc:

Comments:
check article 42 for zoning approval

Attach As: Link Copy Outlook

Reminder Functions:
Due Date: 11/07/07
Recurrence
Notifications
Show Parent Reminders
Expanded view

Client/Matter: Lookup

Reminder Status: Status: Pending Action: Review

Checklists
Forms Library
Delivery History
Open Document
Calendar

Currently viewing parent reminders

ID	Recurrence	Recurrence List	Notifications	Due Date	Complete	Comments
2315	View	0	0	11/7/2007		check article 42 for zoning approval

New Delete Apply OK Cancel



View completed reminders report.

Completed DocMinder History

Document Number	ID	Client	Matter	Document Name	Due Date	Completed Date	Closed By	Comments
81937	6600			Jones Co. Building	10/25/2007	10/26/2007	Bruce Karlson	Prepare for closing
62363	6601			Ingram final article	10/12/2007	10/7/2007	Bruce Karlson	Review Release
81937	41			Jones Co. Building	10/23/2007	10/7/2007	Bruce Karlson	Check to see if appraisal has come back
82624	6599			intern agreement	10/15/2007	10/7/2007	Bruce Karlson	Review Confidential Info terms
85704	6598			Parking lot agreement	10/11/2007	10/7/2007	Bruce Karlson	Review Terms
89210	6597			Skills Profile	10/8/2007	10/7/2007	Bruce Karlson	Review skill requirements
87067	4941			Microsoft TechNet	10/15/2007	10/7/2007	Bruce Karlson	TechNet coming up for renewal
85905	4481			PO 75524 Captaris for	10/1/2007	10/1/2007	Bruce Karlson	SWA renewal
53530	6381			Master WTBS Terms and	9/21/2007	9/21/2007	Bruce Karlson	Check on insurance renewal
53530	2375			Master WTBS Terms and	9/7/2007	9/7/2007	Bruce Karlson	Review article 23 for renewal of franchise agreement

Closed DocMinder Selection

From: 05/28/2007 To: 10/27/2007

Print

Print To File

Output to excel to view reports.

Save As

Save in: MISC

- ADOBE
- MISC
- My Data Sources
- My eBooks
- My Music
- My Pictures
- My Videos

File name: Completed Reminders Report

Save as type: Excel (*.xls)

Save Cancel

[For more information click here](#)

For more information or to schedule a web demonstration call 913-722-3334, ext. 37 or e-mail cparra@wordtech.com