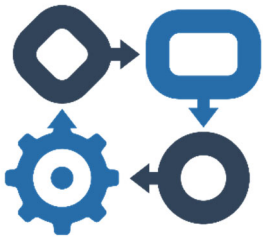




docMgt was built from the ground up to support desktops, laptops, tablets and smart phones. Since docMgt is completely web based there is no software to install for the client machines and no apps to install on any tablets or phones. You can't make client-side management any easier.

## Workflow



### Workflow

Greater efficiency is gained by using workflow to deliver documents to users that need them, when they need them. No more guessing when work needs to get done. Let the system help you manage these needs. docMgt's unique and flexible Work Trigger system is more efficient in responding to changes in basic needs as well as those one-off emergencies that come up.

## Workflow Automation



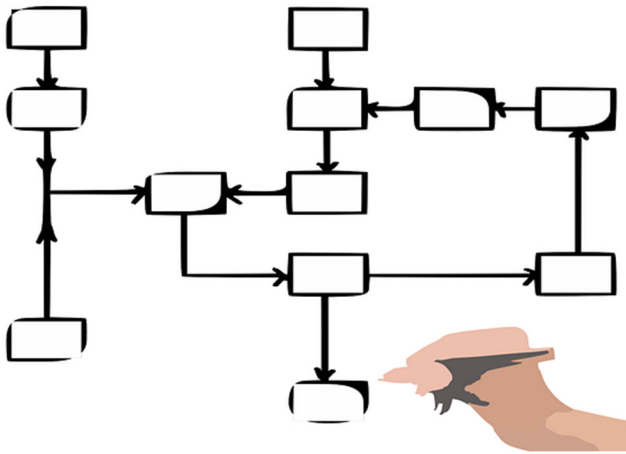
Workflows are triggered when data is added or changed

Emails can be sent to notify users of an assignment

The decisions users make determine the next step in the process

Workflow steps can generate new forms and distribute them

Workflow steps can also set future retention actions based on policies



### Workflow Triggers

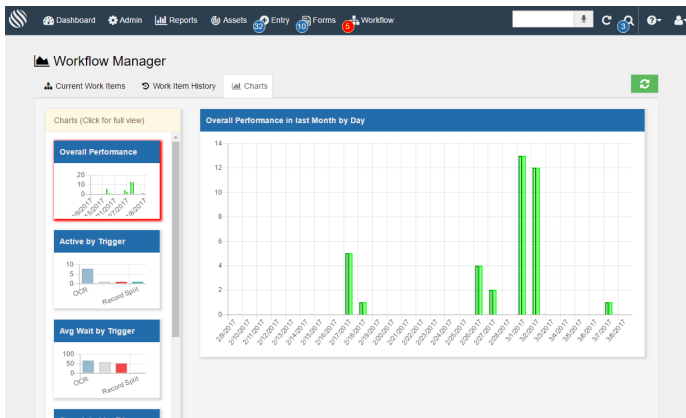
Workflow is simply the process of moving data to the proper users or processes for them to do their share of a larger process. Once that user/process is done, the workflow system then moves the data to the next user/process for the next phase of work and so on. docMgt has a unique Work Trigger system that is designed to accomplish this in a simple and flexible manner.

Work Triggers allow you to focus on a step at a time and put them into the system simply and easily. They do not force you into a set of stringent rules regarding how and

when items can move between work steps. With Work Triggers, if the work needs done then the steps will be activated and if not then they won't. No more drawing arrows and boxes or writing scripts. Let our Work Trigger system do the hard work for you!

For the more experienced workflow users they will appreciate how they can navigate the process without being tied down by restrictions and rules forced on them with other systems. Inexperienced or casual workflow users will appreciate how easy it is to set up and use workflow.

The Workflow Fact Sheet is available for more information about the differences between workflow in docMgt and other systems.





### Management and Reporting

Each user also has their own workflow information panel that keeps track of their performance over the past 30 days. By reviewing this, employees can see how closely they are hitting their goals and whether they need to address an issue or their process requires any tuning.

Workflow Managers have a similar panel that shows them the workflow performance across all triggers they manage. This allows them to monitor the KPI/SLA information of their processes to ensure

compliance and goal attainment. They can also reassign work as needed to help spur on better productivity. Reporting users are given rights to run current and historical reports for workflow. This includes overdue reports, user workflow reports, work trigger reports and more.





### docMgt Work Item Summary

You have 2 Work Items waiting to be processed. Click the link below to view your Work Items.

[View Work Item List](#)

### Notifications

Work Triggers utilize notifications via Email, Text or the docMgt UI to let users of new work assigned to them. Each notification can be completely customized to provide the proper information each user needs to get their work done. Notifications are also available on a daily, weekly, bi-weekly or monthly basis to remind users how much they still have left to do. These are configurable at the user level so each user can decide how much notification they require for their work.

Notifications can also be configured to automatically remind users on a task-by-task basis as part of the built-in Follow Up system.

## Electronic Forms



### Electronic Forms

**Automate and control the way documents are created by using variable content and data in a simple, intuitive way. docMgt provides Electronic Forms and Document Templating to help organizations manage the creation of their documents.**

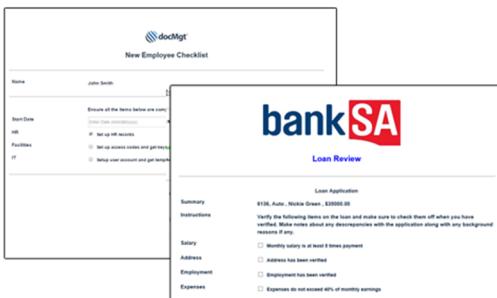
### e-form Process





### Electronic Forms

Electronic Forms (E-Forms) allow for internal and external capture and sharing of information. With docMgt's E-Form builder you can quickly and easily create sophisticated E-Forms that can be used for a variety of uses such as Employment Applications, Time Sheets, Expense Sheets, Invoices and much more. The E-Forms Fact Sheet is available for more information about electronic forms.



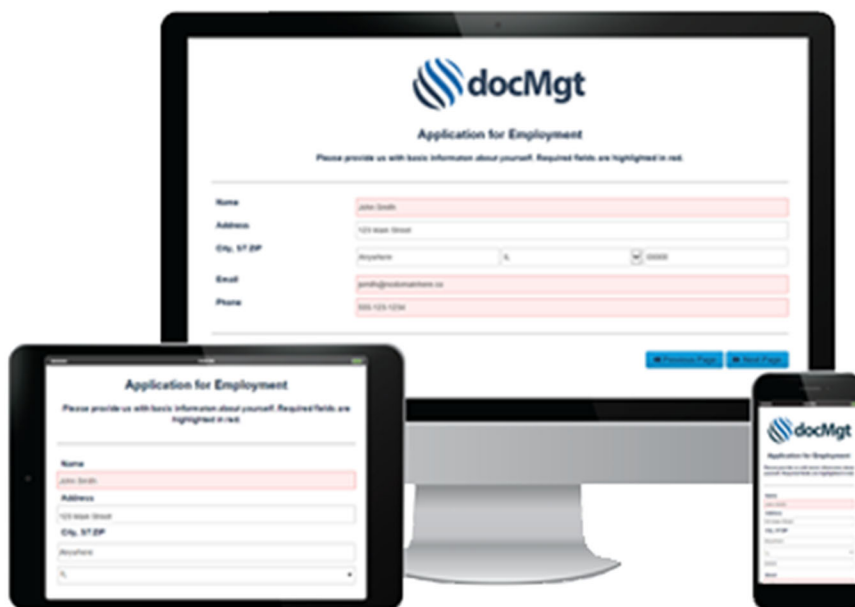
### Document Templating

Document Templating allows users to store sections of documents for re-use within other documents. These sections are called "Snippets" and can include text, images, links, tables or virtually anything that a document can contain. Users can build libraries of snippets that they can organize and share with other users.

Users can then leverage those shared snippets to build their own documents and templates. Best of all docMgt can be configured to update those templates when the original snippets change. This allows organizations to better leverage the information gained from knowledge workers and keeps the responsibility for information maintenance with the correct people.

**ANY DATA**

**ANY DEVICE**



# Indexing Automation



## Indexing Automation

Indexing Automation provides a quick and efficient way to bring documents into docMgt and index them using simple drag and drop actions and click indexing techniques. docMgt uses a simple 4-step process consisting of split, OCR, Index and Classify steps to improve indexing efficiency and accuracy.

Indexing Automation can be used by dragging and dropping documents from your desktop or scanning documents from a shared copier. No special hardware or software is required in addition to docMgt.

## Indexing Automation



Documents are scanned or imported into the system



Through workflow documents are routed to an OCR process



Documents are routed to a document split step



Documents are routed to an indexing step

OCR Results

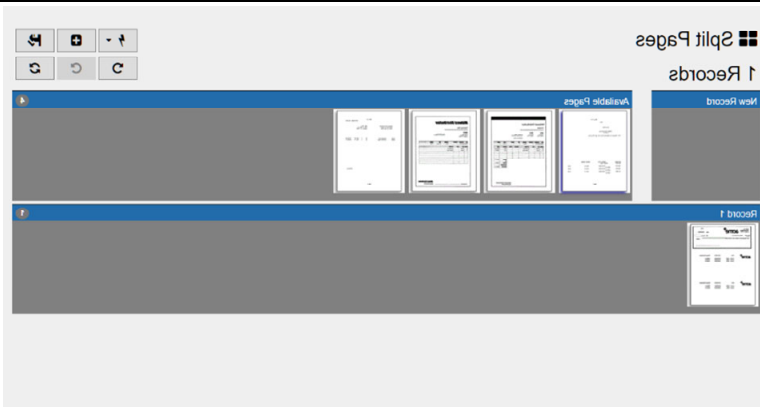
153 Matches (Page 1 of 7)

Navigation: << First | < Prev | Page 1 | Next > | Last >>

SUBMITTED	COMPLETED/STATUS	DOCUMENT ID	PAGES	W/F	ERRORS
Dec 23, 2016 9:52 AM	Dec 23, 2016 9:58 AM	401	7	No	
Dec 23, 2016 9:51 AM	Dec 23, 2016 9:54 AM	400	1	No	
Dec 23, 2016 9:51 AM	Dec 23, 2016 9:52 AM	399	1	No	
Dec 23, 2016 9:51 AM	Dec 23, 2016 9:53 AM	398	3	No	
Dec 23, 2016 9:51 AM	Dec 23, 2016 9:53 AM	397	1	No	
Dec 22, 2016 1:04 PM	Dec 22, 2016 1:06 PM	396	6	Yes	
Dec 22, 2016 10:14 AM	Dec 22, 2016 10:16 AM	395	6	Yes	
Dec 22, 2016 9:51 AM	Dec 22, 2016 10:01 AM	263	13	Yes	

## OCR

OCR stands for “Optical Character Recognition” and is the process of “reading” the text from an image or document. docMgt utilizes OCR to extract not only the words but also the locations of the words for use in searching, splitting and indexing. Once the OCR process has been run on a document that document is ready to move to the Split step.

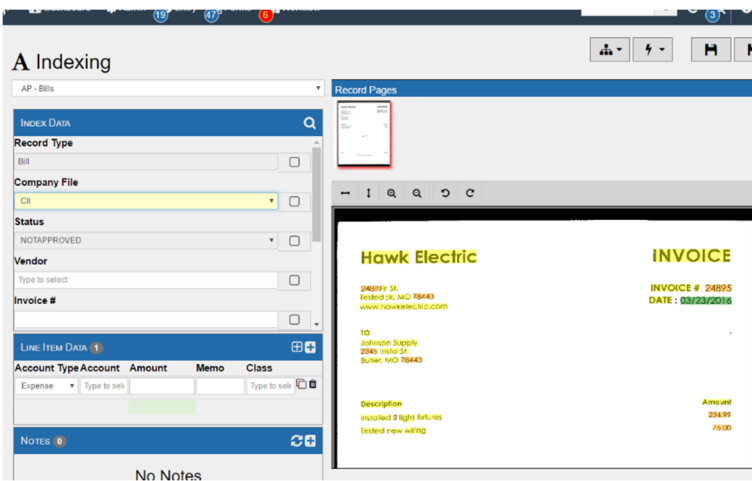


### Split

When pages come into docMgt from a copier or a batch scanning process without any indexing, they are all lumped together into one document. In order to be properly indexed, the pages must be split into separate documents.

The splitting process can be set up to utilize the OCR data to automatically split the pages into documents. The splitting process could also be set up to be a manual drag and drop

operation. Either way, splitting is relatively easy and quick. Once splitting is done then each separate document is sent to the Index step.



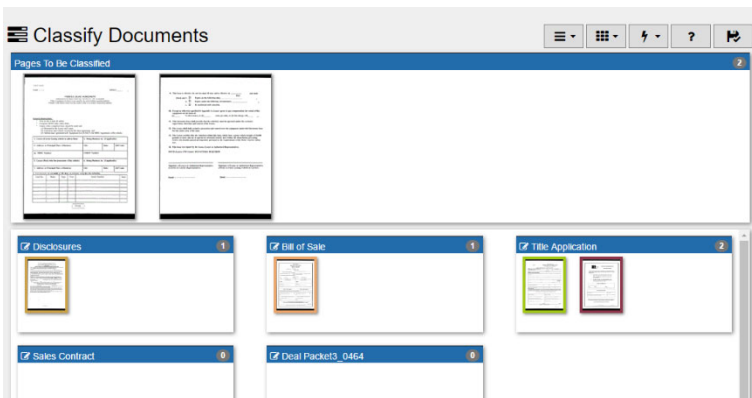
### Index

Indexing consists of entering the data values about each document. These data values are the heart of the system because they become searchable later and drive the workflow for approvals, payments and more.

Indexing is done using a method called "Click Indexing." By simply clicking on words on the page you will be filling in the data fields with the proper information. Anything that needs to be manually entered can be done in the indexing screen as well. This indexing process creates indexed "records" that hold the

information about the entity (invoice, PO, etc) and the pages within the record are considered the "documents" of that entity.

Once we are done indexing, we move on to classify the pages of the record into their respective documents.



### Classify

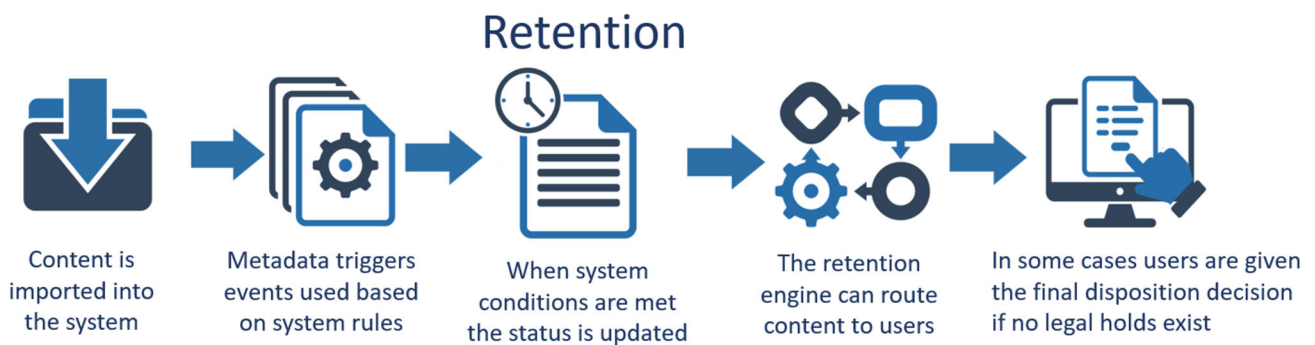
Once the record has been indexed, it is ready for classification. The individual pages of the record are split and then classified into their individual documents to ensure all requirements have been met for the given process. Any missing documents are flagged, and alerts are sent to ensure the missing documents are gathered before any deadline is missed.

# Retention



## Retention

Controlling, governing and facilitating a document’s life cycle mitigates your organizations risks. docMgt provides a fully automated set of intelligent retention triggers that can be configured to identify, archive and dispose of documents based on easy-to-define business rules.



**Retention**

Action: Offline

Trigger: 1 Years

After: Creation

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Action: Delete

Trigger: 30 Days

After: Offline

---

Action: Purge

Trigger: 90 Days

After: Delete

docMgt has a full-featured document retention system that can be easily configured to archive and remove documents from the system. It can be configured to retain or remove documents by type or even on a document-by-document basis as needed. Users can even place a “retention hold” on documents so if there is a need to extend the life of a document, due to situations such as pending litigation, users can be sure the document will not be destroyed. Once the hold is removed the normal retention rules will apply to that document.

# Project Success Plan

Initial Customer Sales Call

An Eakes' Digital Imaging Specialist will conduct an initial meeting with the customer to discuss and vet out the Document Imaging Opportunity.

Project Discussion

Eakes will engage our Technology Service Consultant to perform a joint call with the Digital Imaging Specialist and the customer to confirm objectives and discover any critical details to the project.

Proof of Concept (Demo)

Eakes will build a custom demo from the information gathered from the Project Discussion meeting. Eakes will then present this solution to the customer for their review.

Completed Proposal

Upon completion of the Demo a final review of the objectives will be discussed. Upon confirmation of all details, Eakes will provide the finalized pricing proposal for the customer's review.

Project Implementation

Before Installation of the software a Final Detailed Statement of Work (SOW) will be created by Eakes outlining the customer's objectives and expectations.

Detailed Statement of Work

Upon the agreement of the SOW Eakes will install and configure the system based off the information gathered from the Project Discussion and the Demo.

Installation

Once the software configuration is completed Eakes will review what has been setup. Any small last-minute changes will be addressed prior to training.

Review Proof of Concept

Training is provided into two groups: End-User and Administrator. End-Users are shown the system, how it was customized for your specific company as well as using it day to day. Administrators are additionally trained on how to maintain the system.

Training

The Implementation is reviewed with the customer to review the project in its entirety.

Post Implementation Review

Project Completion

The customer is delivered a copy of the SOW which includes details on the project rendered, discovery notes, and more. A copy of the SOW is to be signed and returned by the customer following the project's successful implementation.



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# Approval

**Customer**

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Printed Name

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Signature

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Title

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Date