

ETCETERA[®] ECM - Enterprise Content Management

ECM - Online Browser Based Document & File Management

ECM is the ETCETERA[®] module for online browser-based document and file management for nearly any purpose. ECM is a fourth generation, mature, highly customizable product that replaces Sceris DMS with new features, the elimination of a windows client, scanning in the browser at full rated speed, and the ability to store and access over 100 file types through a Scalable Vector Graphics (SVG) viewer supporting HTML5 and access on mobile devices.

ECM is a technology platform used to organize, acquire, catalog, and access documents and files of all types. Applications configured in ECM are customer-managed and organized in document classes that are defined by the client.

ECM is scalable, from single-user standalone environments to thousands of users. Part of its scalability lies in a unique file storage methodology that also protects documents from unauthorized

access. This file structure also provides faster storage and retrieval methodologies and supports rapid backup and recovery processes. Document classes and individual documents are automatically secured to restrict unauthorized access.

ETCETERA[®] ECM integrates seamlessly with ETCETERA[®] EPM, and a multitude of host applications. ECM provides for an electronic repository of documents that includes self-managed and automated records retention processes.

ETCETERA[®] ECM is used to enable other applications including online or web facing applications.

ETCETERA[®] ECM helps organizations accomplish more with less. Find out for yourself. Check it out.

MEETING TODAY'S NEEDS AND TOMORROW'S VISIONS

ETCETERA® Enterprise Content Management (ECM) is a mature, highly customizable application platform. It is built on a foundation of extraordinary performance, ease of use, security and scalability. It is an application platform that provides for many solutions, each customer-designed and implemented.

In its most basic use ECM is an electronic document repository used for scanning documents; importing graphic files such as PDFs, JPEGs and DICOMs; importing files of multiple formats; importing print files; and storing documents presented by the ETCETERA® EPM application environment.

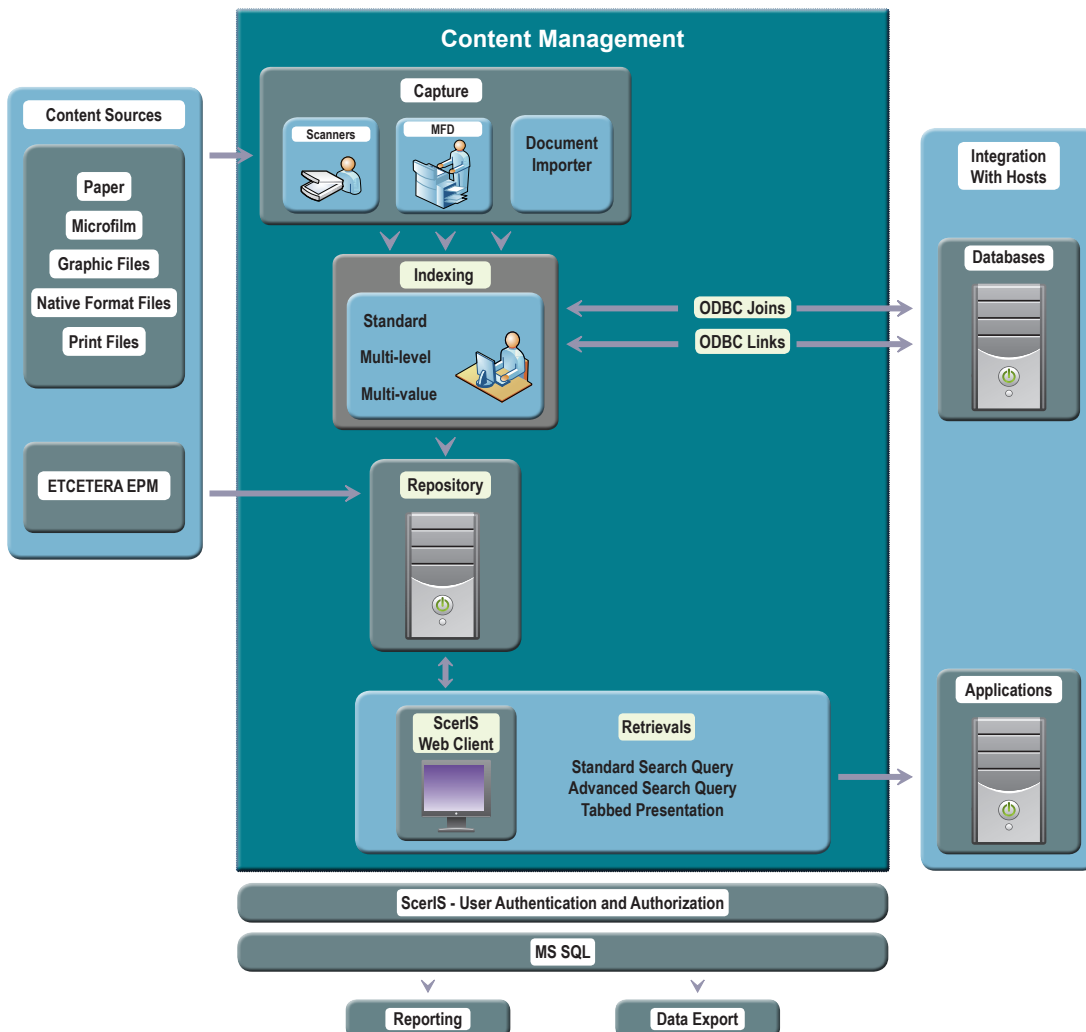
Users can view the documents within document classes for which they have permission. Documents within a document class are automatically or manually secured, further restricting access. Documents can be accessed by users across document classes. Documents can be seamlessly accessed from host applications.

ECM in more advanced use provides for process reviews and authorizations, alerts users to specific events or conditions, and seamlessly enables other applications with supporting documentation.

Advanced users benefit from many robust features that help reduce human effort and deliver solution efficiencies that lead to a very low total cost of ownership. Minimizing user involvement to acquire and index documents is accomplished with automated document segmentation recognition. The ScerIS Work Manager is an environment that provides thumbnail image viewing, segmentation or rejoining of images into documents, rescanning and image insertions. It includes manual indexing that is enhanced with database joins (attaching the document record to external data sources), database links (which pull data from data sources and makes it a part of the indexing of the document in ECM), and multi-value indexing methods, which are used for highly targeted page level retrievals.

Retrievals are conducted from within the ScerIS Simple Search or Advanced Search Query environments or dynamically from other host applications. Search results can be selected for viewing, printing, exporting or emailing. The search results list can be transferred into a spreadsheet.

ECM helps organizations achieve compliance requirements. Best of all may be that ECM self-manages the database environment and doesn't require a database administrator. Additionally ECM self-manages all stored document files and document volumes.



Implementation of ETCETERA® ECM is easy as 1 – 2 – 3

1. DESIGN

The ScerIS Solutions Team is your full-service resource helping you determine and document your requirements for Electronic Document Management Solutions using ECM. This team works with you through all project planning including strategic requirements definition, hardware selections, and defining document management processes.

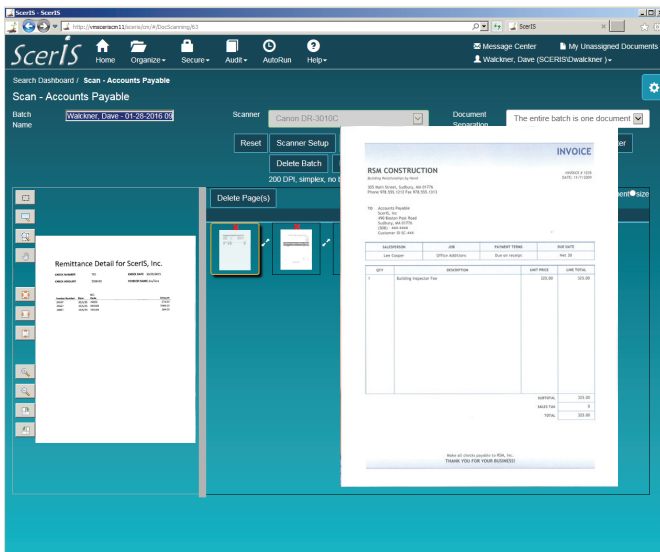
2. DEVELOP

The ScerIS Solutions Team works with your assigned administrators to develop and implement system requirements for document classes, new process requirements, methods for document capture, document indexing, integration to host applications and databases and security requirements. The solution created is personalized to your organization's needs.

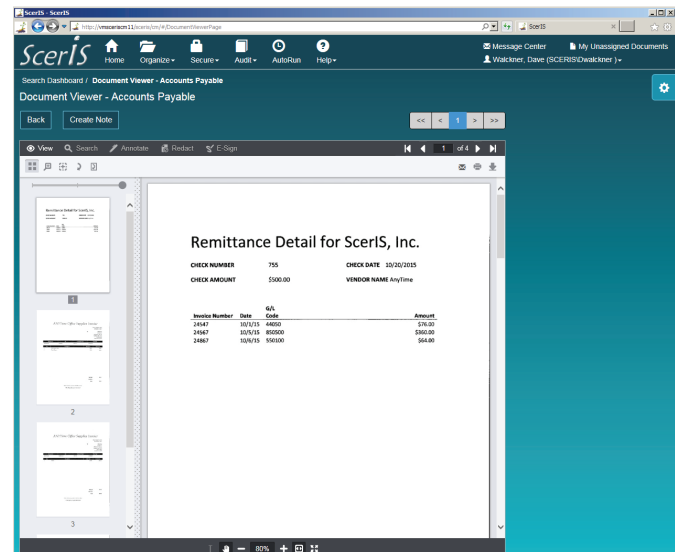
3. DEPLOY

The ScerIS Solutions Team works with you to implement your solution(s), develop relevant user documentation and provide training for users. A goal of all ScerIS implementations is to help each customer become self-sufficient with their ECM environment. This team works closely with your team to ensure complete, end-to-end project satisfaction.

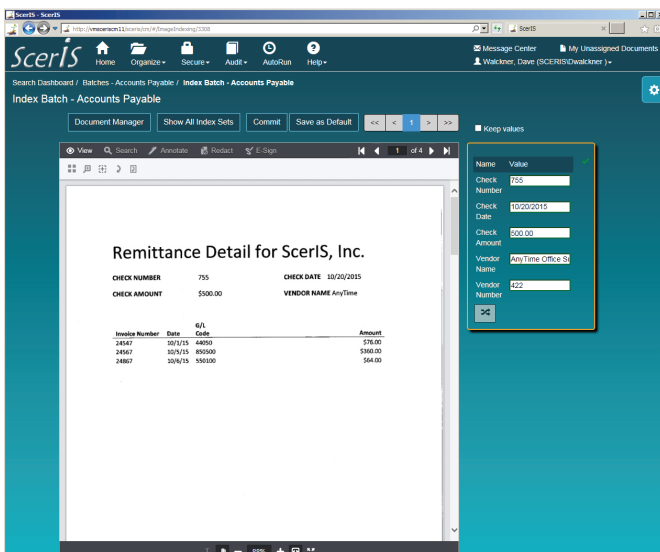
Sample Application Screenshots



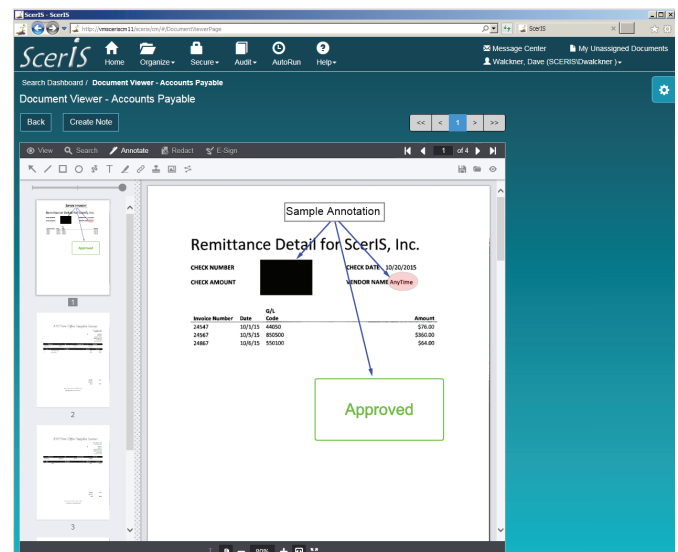
Scanning Interface



Standard Search Results with Image



Indexing Interface



Tabbed Search Results with Image

ETCETERA® ECM Functions

Administration

- Creating Document Classes
 - Create New Document Class
 - Clone Document Class
- Scanned Documents
- Native Format Files
- Print Files
- Disallow Duplicate Primary Indexes
- Apply Multi-Value Indexing
- Setup Index Values
 - ASCII
 - Date
 - Decimal
 - Predefined Values
 - Interactive Module
- Assign Volume Group
- Assign Retention Code
- Creating Indexes
- Add ODBC Join
- Add Bar Code Recognition
- Determine Index Prefill Source
- Image Release to Assigned Path
- User Profiles
 - Advanced Password Policy
 - Password Expiration Period
 - Menu/Access Level
 - Allow Notes Creation
 - Allow Notes Viewing
 - Notes Signature
 - Document Class Security
 - Document Security
 - User Profile Cloning
 - ScerIS Authorization Service
 - Single Sign-On
- Assign Document Class Security
- Assign Document Security
- Delete Documents
- Delete Document Classes
- Look-up Tables
 - Setup
 - Attach/Detach to Document Class
 - Apply Values
- ODBC Joins
 - Setup
 - Connect
 - Index
 - Search
- ODBC Links
 - Setup
 - Attach/Detach to Document Class
- Tabbed Presentation
 - Setup
 - Define Document Hierarchy
 - Assign Tab & Text Color
 - Attach/Detach to Document Class
- Document Retention
 - Setup
 - Define Retention Periods
 - Assign Retention to Document Class
 - Purge by Retention
 - Setup
 - Define Purge Schedule
 - Define Purge Actions
 - Assign Purge to Document Class
 - Modify Document Index Values
 - Re-index Documents
- System Configuration Management
 - File Locations
 - General
 - Archiving
 - Enable/Disable Activity Logging/Audit Trails

Document Capture and Indexing

- Scan Batch/Document
- Scanner Setup
- Barcode Setup
- Document Separation
- Batch Controls
- Process
 - Start Batch
 - Pause
 - Scan One
 - Delete Page
 - Release Batch
 - Resume
 - Delete Batch
- Import Batch/Document
- Indexing
 - Predefined Index UDI Order
 - Image Handling
 - ODBC Join
 - ODBC Link
 - Advanced Settings
 - Applying Look-up Tables
 - Show All Index Sets
 - Keep Values
 - Un-indexed Batch Management
- Document Manager
 - Mark For Rescan
 - Rotate 90 Clockwise
 - Merge With Previous Document
 - Jump to Next Marked Image
 - Split Document on Selection
 - Delete Selected Document
 - Delete Selected Page(s)
 - Unmark Selected Pages
 - Scanning Controls
 - Rescan Current Page
 - Insert Page Before Selected
 - Insert Page After Selected
 - Advanced Options
 - Sort by Document
 - Sort by File Size (Largest to Smallest)
 - Sort by File Size (Smallest to Largest)
 - Scanner Setup

Document Searching, Retrieval and Viewing

- Searching and Retrieval
 - Standard Search Query
 - Advanced Search Query
 - Search Results
 - Tabbed Presentation Results
 - User Defined Search Preferences
 - Text Search
 - Print
 - Export
 - Send To (Email)
- Document Viewing
 - Image Handling Functions
 - Adding Notes
 - Viewing Notes
 - Image Redaction
 - Print File Viewing (with Form Overlay)
- User Defined Document Search Groups
 - Setup
 - Public/Private Access
 - Set Index Order
- Pack and Go
 - Standard Pack and Go
 - Pack and Go with Indexes
 - Pack and Go for Spreadsheets
- Seamless Integration to Host Applications

Core Components of ETCETERA® ECM

Document Capture and Indexing: Documents are captured using techniques applicable to the source.

ScerIS Scanning and Indexing Module: Paper documents are captured on scanners, multi-function devices (MFDs) or fax machines. Scanned documents are automatically segmented using a patch code page. Scanned or imported documents can be viewed as thumbnails in ScerIS Work Manager where documents can be segmented or pages joined to create documents, pages can be flagged for rescanning and a page(s) missed during scanning can be scanned and inserted into appropriate page position in a document. The indexing module provides for keeping values from one document to the next to reduce data entry activity, and joins other data bases and links to external data sources to reduce keying and produce unmatched indexing accuracy. Bar codes are used for automated indexing. Multi-level indexing provides for parent and subordinate index sets, Multi-value and pointers to specific pages in the document.

ScerIS Document Importer: Graphic files and other native format files are captured using the ScerIS Document Importer and indexing methods work similarly to indexing methods for scanned documents.

Print File Importer: Print files are imported manually or automatically using the AutoRun Application. Print files are automatically compressed and indexes are automatically extracted using key word, positional and regular expression syntax (to find indexes in random locations).

Document Retrieval: Standard or Advanced Search Query functions produce Search Results (list of documents whose index values match those in the query). Queries can be based on exact matches, wild cards, ranges of values and <,>,< and > Print Files can be further searched using the Text Searching function. Search results can be presented in a simple listing or in a tabbed presentation that typically represents the organization of documents in paper folders.

Seamless Integration: Request documents directly from host applications using ScerIS Seamless Integration or add "Get Document" functions to existing applications and request documents using a URL address.

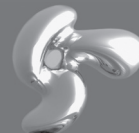
Security: ETCETERA® Authorization Services (AUTH) provides user authentication and authorization and serves as the access and permissions sub-system for several ScerIS applications. AUTH provides for complete customization for user groups and permissions. ECM authorizations are easily configured and are included with the ECM deployment. AUTH leverages Windows Authentication and Single Sign-On.

Data Export: Data export scripts can create and export data files from completed transactions to host computer systems in the formats required by the host applications using MS SQL scripts. Services are often provided by the ScerIS Solutions Team, but some customers are self-sufficient in this area. Typical formats include: CSV, ANSI X12 810, ANSI X12 835, ANSI X12 837, HL7 and more.

Reporting: Reports are created using MS SQL Reporting Services and customized to your requirements. Reports are often developed by the ScerIS Solutions Team, but some customers are self-reliant in this area. Training is available for clients wishing to become proficient in report generation.

Call Us ...

We offer a free, no-obligation opportunity for you to speak with a member of our ScerIS Solutions Team to have your questions answered about ScerIS and what CM can do for you.



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