

THE PERFECT DEMO 2006

By carefully following the steps below, and reading the “Talking Points”, you will be able to demonstrate this sophisticated software like a professional. As in most things, practice makes perfect.

Disclaimer: this demonstration documentation is NOT a training guide. (although you will learn the basics by running the software) It was prepared for those who want a fast, easy method to demonstrate or evaluate the software. Altering the procedure without understanding the software can cause unexpected results.

Sample source files

Before launching the software, browse (open) the source images that the demonstration provides. They can be found in C:\Work area and demodata\My Input\Northwind Tifs. Open the 11072.tif file. This is a sample document from the MS Access application. Notice the signature on the bottom and the bar code on the upper left. Documents 11073-11076 are similar. (Note: The documents would be considered “internal” documents; “controlled” by the user. They are structured and repetitive) These documents will be processed in Demo 1 and 2. Open the multipage bar code separation.tif file. Review the 14 pages. Notice that there are 5 “control” documents, each with supporting documents. This document will be processed in Demo 3 and 4. If you choose to use it, you will find the IP 2.8 viewer superior to the Microsoft Tif viewer.

General talking points: This application is a sophisticated document processing application. It is NOT a scanning solution. There are no Twain or ISIS scanner drivers or scanning software included within this application. The manufacturers of scanners and MFP’s provide the most optimized drivers and software for their own equipment. **This application is device independent.** It can process virtually any file type; however, maximum image processing capability can best be performed on Group IV single or multi-page tif documents.

The application begins to work only AFTER an image has been created. That process is called **Capture**. There are two methods to capture files. The first is Capture from Email. This process interfaces with MS Outlook and provides many features and options to capture attachments and text body of received emails. The other capture method is Capture from Folder. This process monitors a user-defined “source” folder (hot folder) and sub folders to capture a variety of files types (134). A **workflow** is defined as a series of user-defined steps used to process files into a repository for future retrieval. A **repository** is defined as a central location of documents organized in specific ways to facilitate retrieval. This is an imaging application designed for a production environment, including features such as, Forms Recognition and Registration, OMR, Bar Code Recognition (1D and 2D), Zone or Full OCR, Indexer with database lookup/validation/extraction, Convert to PDF, Metadata Writer and Publishing components. Automated workflows can process thousands of “validated” documents per workstation, per day. The value proposition of this application is derived from its “open” architecture design. The leveraging of free or low cost technologies to perform sophisticated imaging functions provides significant value when compared to competing “locked-in” proprietary solutions. The features of this application can be best leveraged when the documents and the databases allow for complete operator unattended, validated workflows that save considerable time and labor expense.

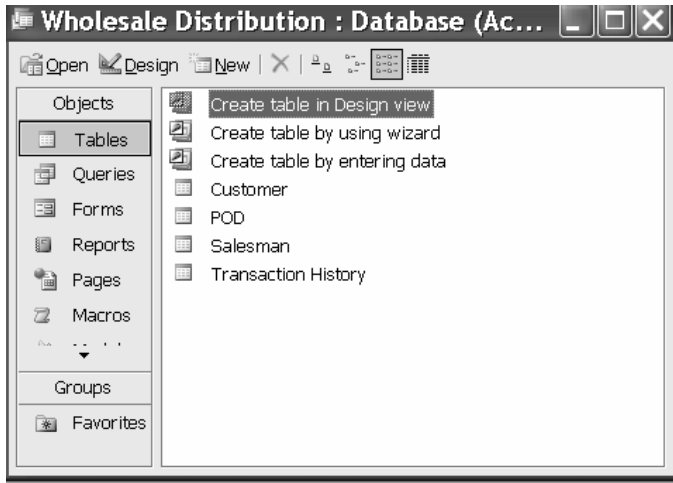
This software is a desktop indexing application that can **update shared server files**. The license is for the desktop only. The “unlimited users”, client-based inquiry program, PDRwin (Indexed Document Retrieval, client utilizing MS Indexing Services and Adobe iFilter) and (Database Document Retrieval, client, user definable, database query) are included with the desktop license.

The main function of this software is indexing. The software is “middleware” that resides within a Microsoft operating environment. Documents are **captured** from **user defined** Microsoft folders or Outlook email...documents are **processed** through **user defined** indexing processes (manual, semi-automatic or automatic)...and documents are **published** to a **user defined folder structures** and user selected backend ODBC compliant databases. The software is tightly integrated with Microsoft tools; such as, Outlook and

Explorer. In addition, free software from Microsoft and Adobe, such as, Indexing Services, Windows Explorer, and the free downloadable Adobe Reader and PDF iFilter are used in conjunction with this application.

Sample databases

Before launching the software, (if Access is loaded on the workstation) browse (open) the databases that the software will use. (Note: Access is ONLY required to “view” the database data. The software will run without Access loaded) The sample databases can be found in C:\Work area and demodata\Databases. The Perfect Demo only uses the Wholesale Distribution.mdb. Open the Wholesale Distribution.mdb. Notice the four tables. (Transaction History-simulates order entry transactions, Customer-contains customer data, Salesman-contains salespersons (these three tables are used for “front end” validation and extraction) and POD- “backend” database used for retrieval. See below.



Launch the application

After installing the DEMO data and the application software on the workstation, navigate to C:\Work area and demodata. Launch the application by double clicking on the .DEMO.exe file. (Default name is DEMO.exe) (Note: contact your application provider if you do not know the name of the application software.)

The application software will load. Read the welcome message and notice the number of launches and documents to process remaining. . Select OK.

Demo # 1

Workflow name: (Wholesale Distribution)

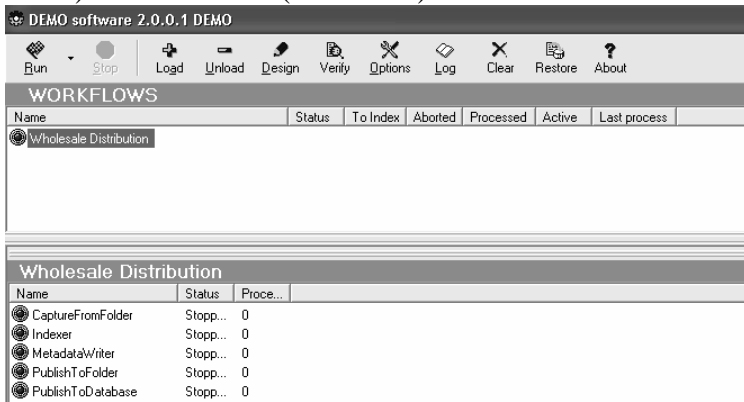
Functionality: *Manual Indexing with database validation.*

Talking Points: The purpose of this workflow is to archive “signed” proof of delivery documents. Depending upon the prospective user’s need, attempt to extrapolate this application to their specific needs. There are many reasons why manual indexing MAY be required. (no bar code to read, dot matrix or hand printed documents that cannot be OCR’d, the “control” number (used for indexing) is not part of the document, etc) The important message to communicate is the value of **VALIDATION**. Without validation, indexing is inefficient and inaccurate. The strength of this software is the ability to *validate and extract existing data that relates to the files that you wish to archive.*

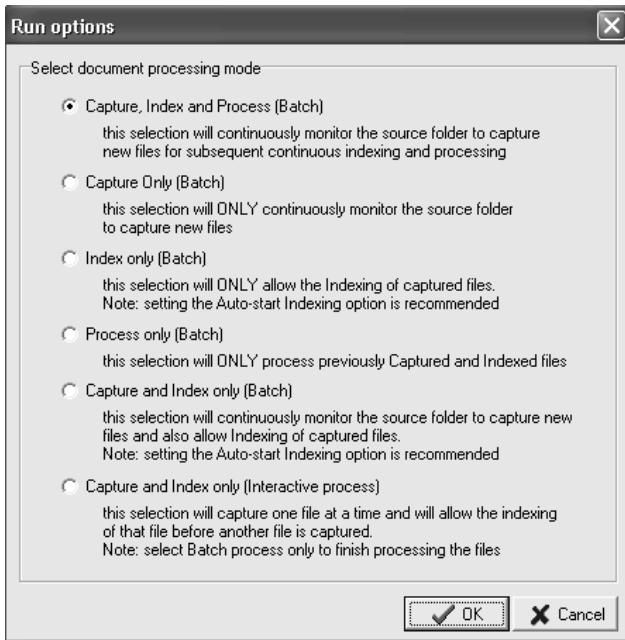
Select the LOAD button. See below.



- A) Navigate to C:\Work area and demodata\Demos\The Perfect Demo
- B) Select Wholesale Distribution workflow (double click or highlight and select Open). The workflow will LOAD.
- C) Select RUN. (see below)

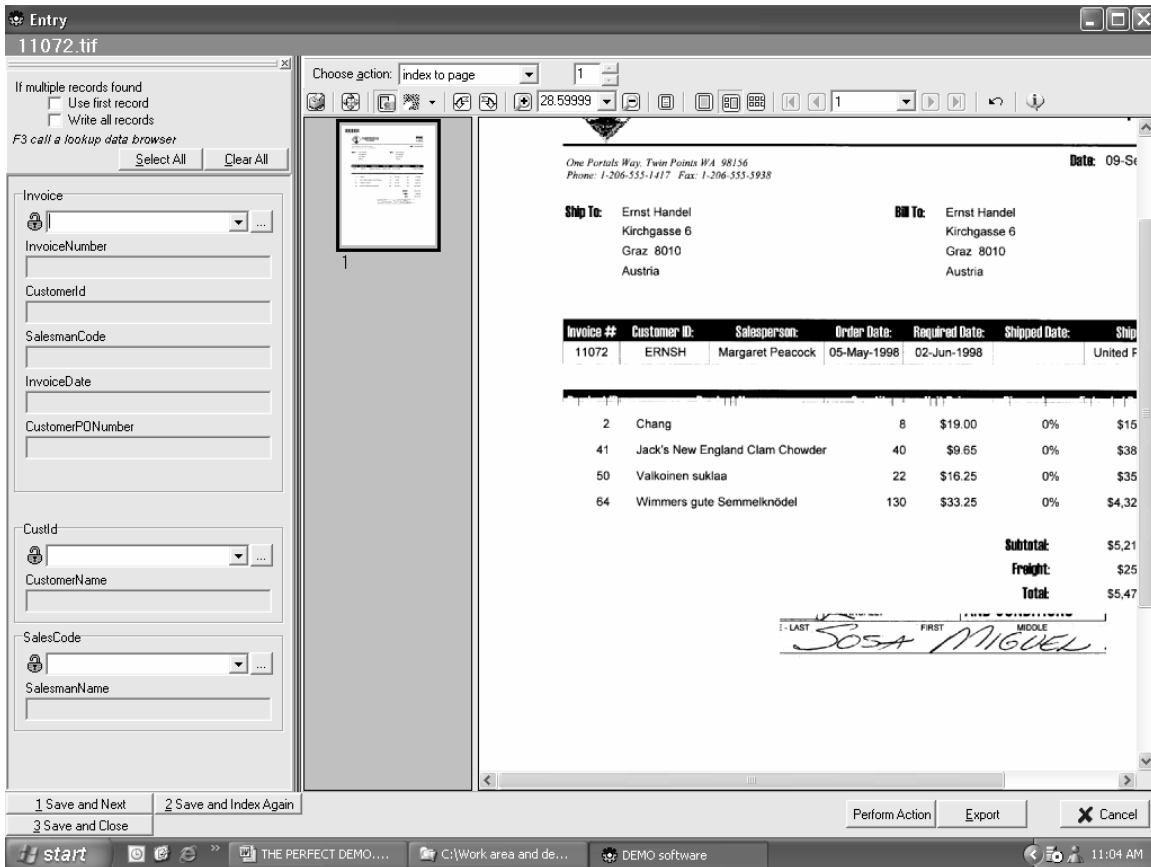


After selecting RUN the following Run options window will appear. (see below)

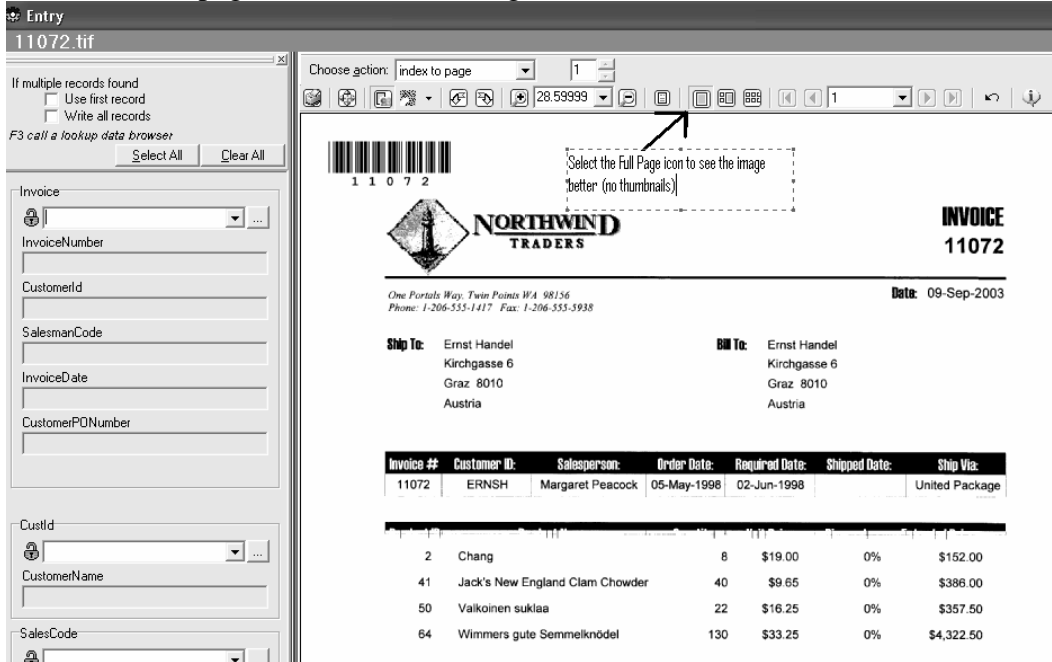


Select OK to begin processing.

- D) The following screen will appear. (see below)



Select the Full page icon to see the image better (no thumbnails) (see below)



Enter the Invoice 11072 and the enter key. (see below)

11072.tif

If multiple records found
 Use first record
 Write all records
F3 call a lookup data browser
 Select All Clear All

Invoice. Exact matching
 11072
 InvoiceNumber
 11072
 CustomerId
 ERNSH
 SalesmanCode
 2
 InvoiceDate
 2004-09-01T00:00:00
 CustomerPONumber
 PO7859

CustId. Exact matching
 ERNSH
 CustomerName
 Ernst Handel
 SalesCode. Exact matching
 2
 SalesmanName
 Margaret Peacock

Choose action: index to page 1

28.59999

1 1 0 7 2

NORTHWIND TRADERS

INVOICE 11072

One Portals Way, Twin Points WA 98156
 Phone: 1-206-555-1417 Fax: 1-206-555-5938

Date: 09-Sep-2003

Ship To: Ernst Handel
 Kirchgasse 6
 Graz 8010
 Austria

Bill To: Ernst Handel
 Kirchgasse 6
 Graz 8010
 Austria

Invoice #	Customer ID	Salesperson	Order Date	Required Date	Shipped Date	Ship Via
11072	ERNSH	Margaret Peacock	05-May-1998	02-Jun-1998		United Package

2	Chang	8	\$19.00	0%	\$152.00
41	Jack's New England Clam Chowder	40	\$9.65	0%	\$386.00
50	Valkoinen suklaa	22	\$16.25	0%	\$357.50
64	Wimmers gute Semmelknödel	130	\$33.25	0%	\$4,322.50

Subtotal: \$5,218.00
 Freight: \$258.64
 Total: \$5,476.64

LAST FIRST MIDDLE

Notice the **VALIDATION** and **EXTRACTION** from the database.
 Select Save and Next (or Alt 1) for the next image. (see below)

11072

InvoiceNumber
 11072
 CustomerId
 ERNSH
 SalesmanCode
 2
 InvoiceDate
 2004-09-01T00:00:00
 CustomerPONumber
 PO7859

CustId. Exact matching
 ERNSH
 CustomerName
 Ernst Handel
 SalesCode. Exact matching
 2
 SalesmanName
 Margaret Peacock

1 Save and Next 2 Save and Index Again
 3 Save and Close

NORTHWIND TRADERS

INVOICE 11072

One Portals Way, Twin Points WA 98156
 Phone: 1-206-555-1417 Fax: 1-206-555-5938

Date: 09-Sep-2003

Ship To: Ernst Handel
 Kirchgasse 6
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Bill To: Ernst Handel
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Subtotal: \$5,218.00
 Freight: \$258.64
 Total: \$5,476.64

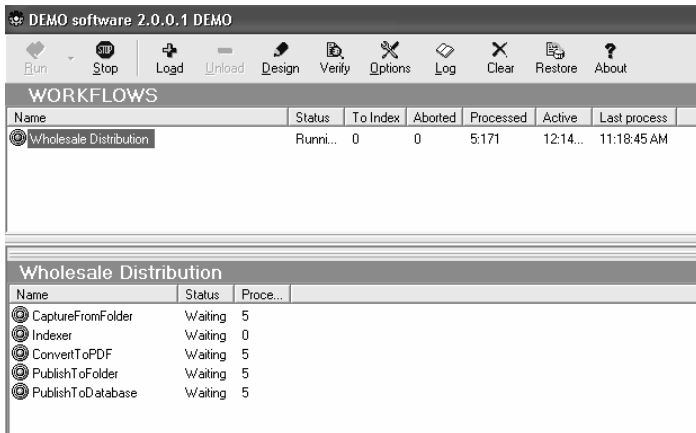
LAST FIRST MIDDLE
 SOSA MIGUEL

Select Save and next or Alt 1 for the next image

Perform Action Export

start THE PERFECT DEMO... C:\Work area and de... DEMO software untitled - Paint

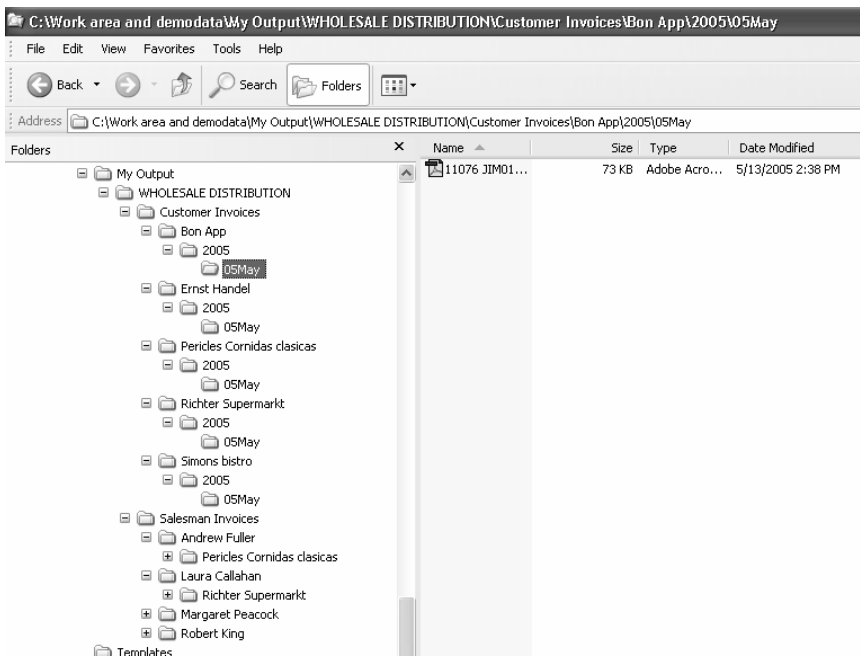
Repeat the above steps until all five images (11072-11076) have been indexed.
 Note: Instead of entering the Invoice Number, you may select the ellipse button to the right of Invoice Number entry to browse the database. Double click the correct record or select OK.
 When finished, the application will return to show all documents have been published. (see below)



Select the STOP button and the UNLOAD button to complete Demo # 1. (see above)

Showing the Windows Explorer File Structure Output

After processing the five documents in Demo #1, navigate to C:\Work area and demodata\My Output. (see below)



It is important to point out that the folder and file structure can be whatever the customer desires. Oftentimes, it would replicate their manual filing system. Notice that the source images were Tif, the application converted them to PDF automatically.

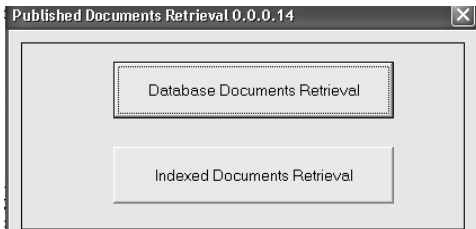
Show the PDF Metadata

Navigate to C:\Work area and demodata\My Output. Drill down the folder structure until you reach the file level. You will see a PDF document(s). Open the document with an Adobe product. Select File, Select Document Properties. The metadata (Title, Subject, Author, and Keywords) will display. The “indexing” data is burned into the PDF document. There are many advantages of this result. One of the most important

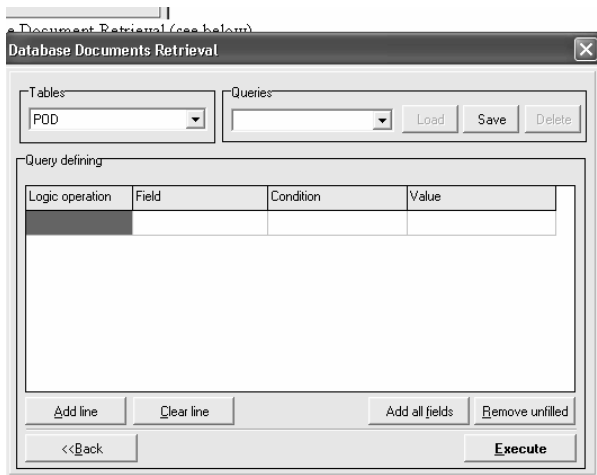
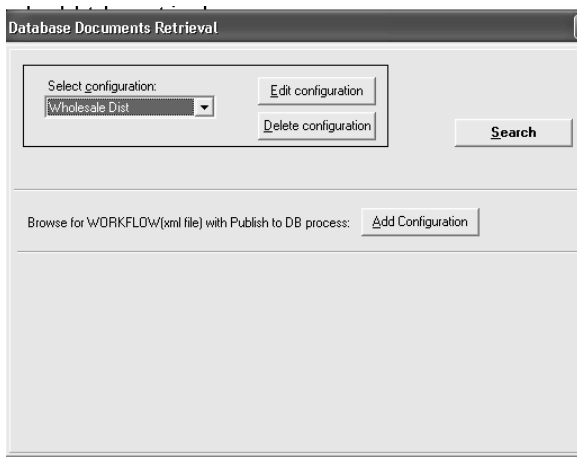
advantages is that with the use of free, enterprise software (MS Indexing Services and Adobe iFilter) a robust unlimited user retrieval capability can be achieved.

Showing the backend database retrieval

After processing the five documents in Demo #1, navigate to C:\Work area and demodata\PDRWin.exe. Launch the retrieval program (PDRWin.exe) by double clicking on it or create a shortcut on your desktop. (see below) Select Database Document Retrieval (see below)



Select Search (see below)



Left mouse click below Field. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber		

Add line Clear line Add all fields Remove unfilled

<<Back Execute

Pull down the Field list. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber		

Add line Clear line Add all fields Remove unfilled

<<Back Execute

Select Invoice Number. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber		

Add line Clear line Add all fields Remove unfilled

<<Back Execute

Left mouse click below Condition. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	EQUALS	

Add line Clear line Add all fields Remove unfilled

<<Back Execute

Pull down the Condition list. (see below)

Database Documents Retrieval

Tables: Queries: [Load] [Save] [Delete]

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	EQUALS	

Condition dropdown menu options: EQUALS, LIKE, GREATER THAN, LESS THAN

[Add line] [Clear line] [Add all fields] [Remove unfiled]

<<Back [Execute]

Select GREATER THAN. (see below)

Database Documents Retrieval

Tables: Queries: [Load] [Save] [Delete]

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	

[Add line] [Clear line] [Add all fields] [Remove unfiled]

<<Back [Execute]

Enter a value of 1. (see below)

Database Documents Retrieval

Tables: Queries: [Load] [Save] [Delete]

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1

[Add line] [Clear line] [Add all fields] [Remove unfiled]

<<Back [Execute]

Select Add line (left bottom). (see below)

Database Documents Retrieval

Tables: Queries: [Load] [Save] [Delete]

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1
OR			

[Add line] [Clear line] [Add all fields] [Remove unfiled]

<<Back [Execute]

Left mouse click on new line below Logic operation. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1

Pull down list of Logic operations. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1

AND
OR
AND NOT
OR NOT

Select AND. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1
AND			

Left mouse click new line Field. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
AND	InvoiceNumber	GREATER THAN	1

Add line Clear line Add all fields Remove unfiltered

<<Back Execute

Pull down Field list. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
AND	InvoiceNumber	GREATER THAN	1

InvoiceNumber
CustomerId
SalesmanCode
InvoiceDate
CustomerPONumber
CustomerName
SalesmanName

Add line Clear line Add all fields Remove unfiltered

<<Back Execute

Select CustomerName. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
AND	CustomerName	GREATER THAN	1

Add line Clear line Add all fields Remove unfiltered

<<Back Execute

Left mouse click on new line under Condition. (see below)

Database Documents Retrieval

Tables: Queries: Load Save Delete

Query defining

Logic operation	Field	Condition	Value
AND	CustomerName	GREATER THAN	1

Add line Clear line Add all fields Remove unfiltered

<<Back Execute

Pull down Condition list. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1
AND	CustomerName	GREATER THAN	

Select LIKE. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1
AND	CustomerName	LIKE	

Enter the value of the source document. In most cases the document

Enter a value of super. (see below)

Database Documents Retrieval

Tables: Queries:

Query defining

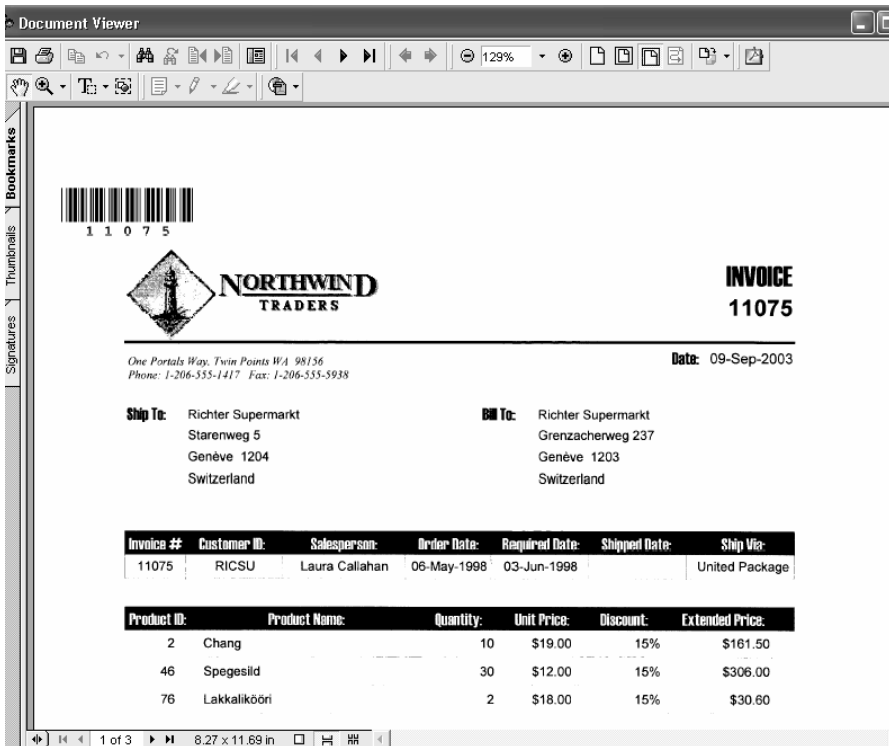
Logic operation	Field	Condition	Value
	InvoiceNumber	GREATER THAN	1
AND	CustomerName	LIKE	super

Select the Execute button (on lower right). (see below)

Query result

InvoiceNumber	CustomerId	SalesmanCode	InvoiceDate	CustomerPONumber	CustomerName
11075	RICSU	4	2004-09-09T0	89054	Richter Supermarkt

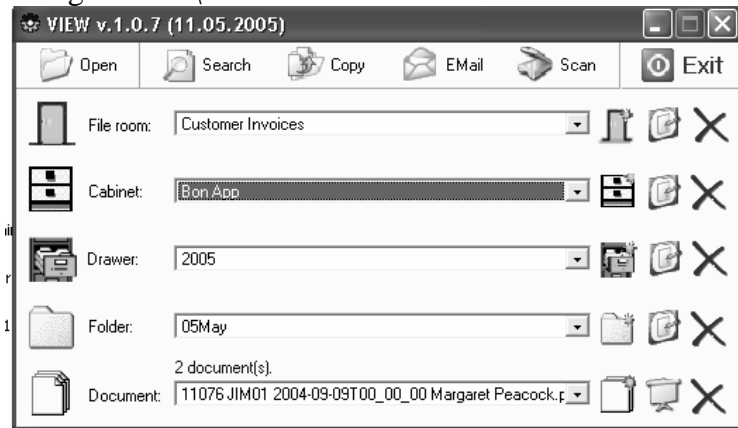
The application returned one record. Double click the line or select View to display the image (see below)



“X” out of the documents and select “Back” to perform other inquiries. Optionally, save the query by assigning a name for future retrieval.

Showing the VIEW product

Navigate to C:\Work area and demodata. Launch the VIEW.exe program. (see below)



Demonstrate how easy it is to navigate within File rooms, Cabinets, Drawers and Folders. Perform a search and display the results.

Note: Demo # 2, 3 and 4 will publish to the SAME file name as Demo #1. Duplicate file names in the Repository will be shown with a sequence number (9999) following the file name. Optionally, duplicate file names can be managed in the Repository by 1) adding a sequence # 2) overwriting (inserting or appending new pages to existing file) or 3) skip writing the image file

Demo # 2

Workflow name: Wholesale Distribution automated using file name

Functionality: Automated indexing with database validation

Talking Points: The purpose of this workflow is to process the SAME documents from Demo # 1 except, in this demo, to have them process automatically (operator unattended). This is the ultimate goal for processing documents. In Demo #2, the documents are processed by using the file name of the source document. In most cases the automated workflows are a result of bar code recognition or zone OCR. This workflow “simulates”

that process. While the workflow is running and processing automatically, take the time to stress the importance of validating (accuracy) and the value of an automated workflow (efficiency-no labor).

Follow the same steps as described in Demo #1, except load the “Wholesale Distribution_automated using file name” workflow.

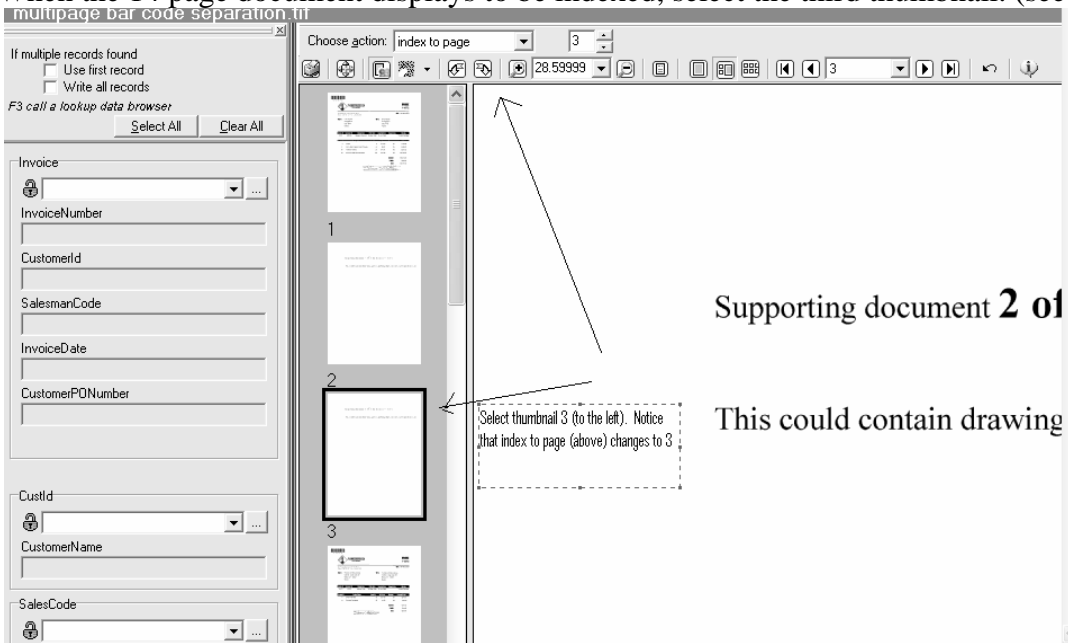
Demo # 3

Workflow name: OnLine splitting of multipage tif

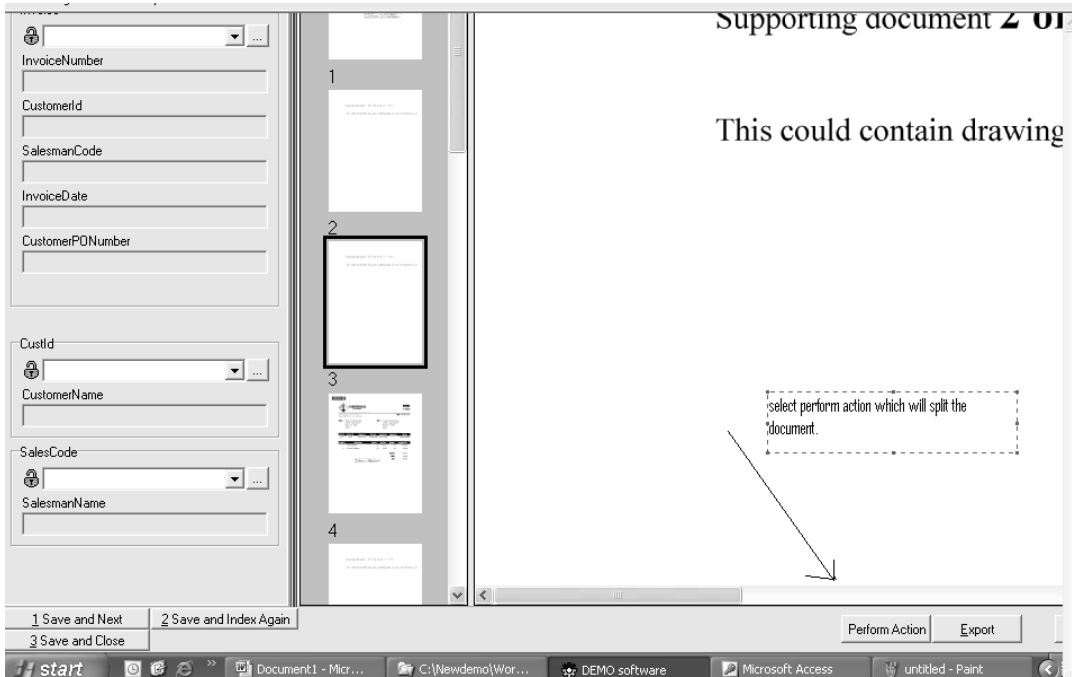
Functionality: *Manual separation and manual indexing with database validation*

Talking Points: The purpose of this workflow is to process one multipage (14 pages) tif document that is comprised of 5 separate documents. The benefit is that the 5 documents need not be separated in advance. The 14 pages can all be placed in the ADF (automatic document feeder) and scanned. Demo # 3 showcases the flexibility and superior design of the application.

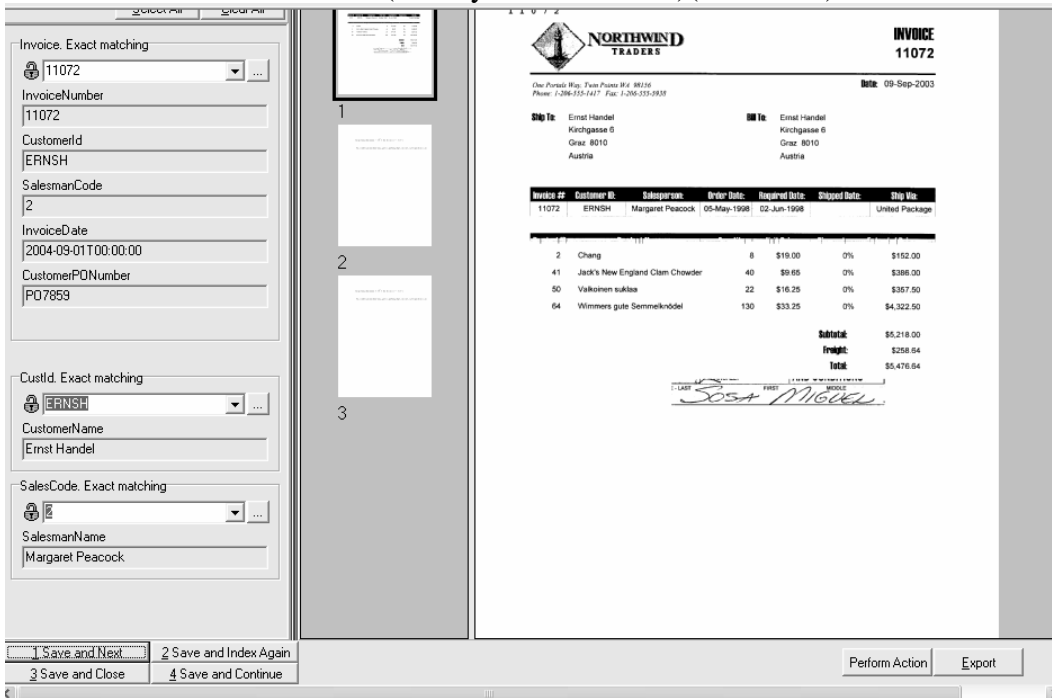
Follow the same steps as described in Demo #1, except load the “OnLine splitting of multipage tif” workflow. When the 14 page document displays to be indexed, select the third thumbnail. (see below)



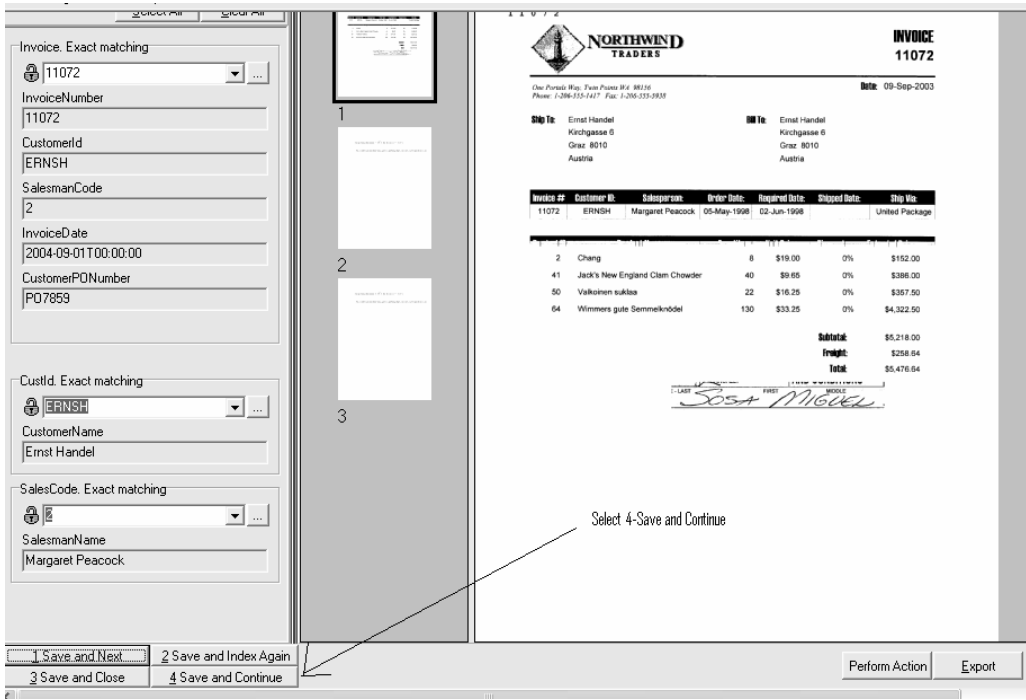
Select perform action (see below).



Enter 11072-Invoice number (exactly like Demo # 1)(see below)



IMPORTANT- select 4 Save and Continue (see below)



Perform the same steps to select the thumbnail BEFORE the next control document and split and process the remaining 4 documents.

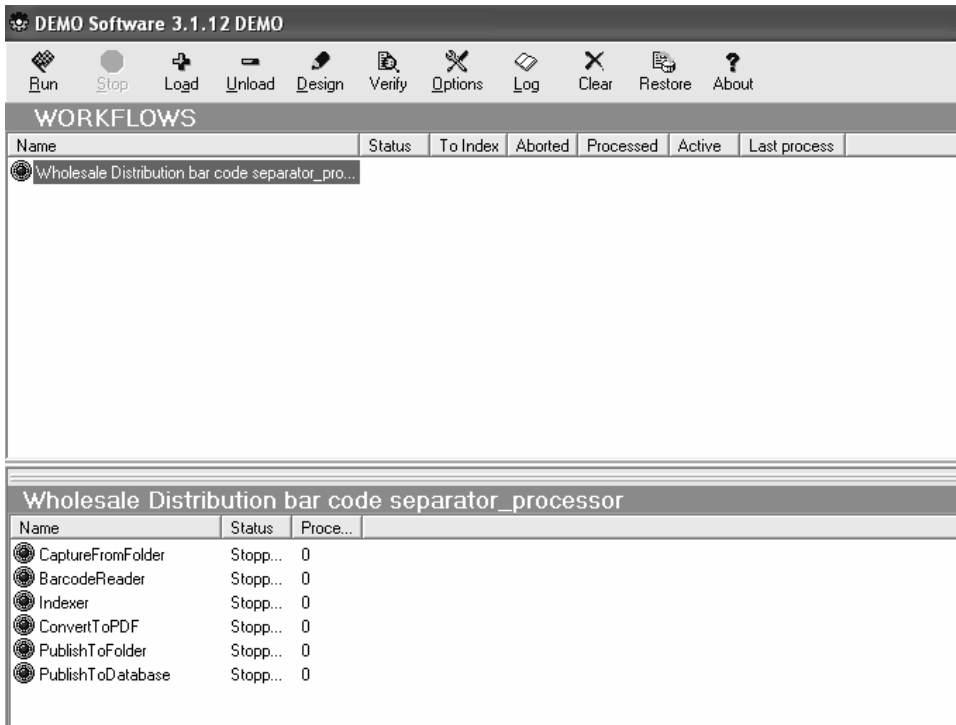
Demo # 4

Workflow name: Wholesale Distribution bar code separator_processor

Functionality: Automatic separation of multipage tif documents using bar codes and automatic indexing and validation using bar codes.

Talking Points: The purpose of this workflow is to process one multipage (14 pages) tif document that is comprised of 5 separate documents automatically. The workflow will separate the 14 pages into 5 separate multipage documents and publish them automatically to windows folder structure and the backend database. Demo # 4 showcases the multi-function capability, the database validation and extraction and bar code recognition capability of the application. These capabilities are NOT found in other software in this price class.

Follow the same steps as described in Demo #1, except load "Wholesale Distribution bar code separator_processor". (see below)



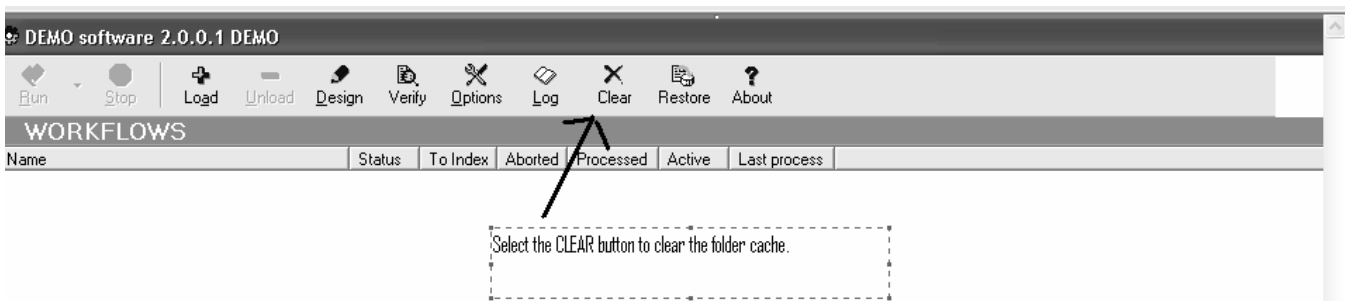
Highlight the Wholesale Distribution bar code separator_processor and select RUN.

The bar code “nag” window will appear 5 times (select OK). (Note: When the licensed copy of the bar code recognition software is purchased (extra charge), the nag screen will disappear) The workflow will separate 14 pages into 5 multipage tif documents automatically, (as performed in Demo # 4 manually), index (and validate) them from the bar code value and publish them automatically to windows folder structure and the backend database.

That concludes the Perfect Demo. The prospect should be willing to invite you to review his business workflows and propose a cost effective system for capturing, process, publishing and retrieving his documents.

To RESET the DEMO for future demos.

Because the workflows were created in Design mode, the source documents are retained for future processing. To clear the “cache” (prevents files from being processed twice) select the CLEAR button. (see below)



Follow the instructions to Clear the Capture from Folder Cache. If you select Clear All, the password is CLEARJOBS. Note: another method to clear the cache and captured files is to navigate to C:\Work area and demodata and delete the contents of the Captured folder and the Misc folder using Windows Explorer.

If MS Access is loaded on the workstation, load C:\Work area and demodata\Databases\Wholesale Distribution.mdb and delete the demonstration records from the POD table (backend database). If MS Access is not loaded, “refresh” the database by restoring the “saved” copy which can be found in C:\Work area and demodata\DEMADATA Backup. Copies of the workflows and sample images are also stored in this path. You

are encouraged to alter the demo workflows as part of the learning cycle. Everything can be refreshed without re-installing.

Using Windows Explorer, navigate to C:\Work area and demodata\My Output. Delete the Wholesale Distribution folder.

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ADVANCED users may wish to interface this application to the vDMS (total document management system).

vDMS provides many capabilities that this application does NOT provide. A list of those features would include:

- * Unlimited users (no seat license)
- * Proprietary security (easy to manage, secure, with encrypted data files)
- * Routing of documents (true workflow)
- * Version control of documents.
- * Detailed access audit files for HIPPA compliance.
- * Distributed scanning- allowing desktops to interactively scan direct to Repository.
- * Voice over image.
- * Advanced document annotation.
- * Direct to email and fax export.
- * web access and remote scanning.
- * move and copy documents and folders.
- * full content management (key word) if setup properly.
- * Linux compatible.
- * Transfer any document from desktop (using Virtual Scan print driver) direct to vDMS.

To evaluate this integration, contact your reseller, distributor or the developer of the software.