

DocuLex WebSearch Demo

This is a step-by-step demo of WebSearch, the Document Management portion of “Archive Studio”. Archive Studio includes both Document Capture and Document Management. This demonstration is intended to be a brief overview of the most popular features of WebSearch, with you in the drivers seat, operating our live online service . Document **Access and Control** will be the focus of the walk through.

To Begin

To launch WebSearch, click on the link below or type the address into your browser application.

Log into WebSearch with the information below.



WebSearch Link:

<https://websearch.accessdoculex.com/WebSearch4/index.aspx?context=loginform&code=OUzib3OkmyozOZtNDCg0RQ%3d%3d>

Login: archivestudio1

or

Login: archivestudio2

Password: archivestudio1

Password: archivestudio2

A time out message will appear if a login is already in use.

The file capture and indexing demonstration is not included in this presentation, but for those curious about the various techniques to capturing information, Archive Studio includes the most modern and productive methods of capturing and indexing files.

Digital copiers, FAX, desktop, large format and network scanners. Including, electronic file creation products such as Microsoft Office, AutoCAD and various practice management products.

What is used to create electronic files?

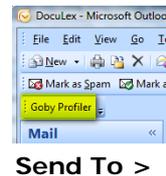
Digital Copiers, FAX and Network Scanning

Archive Studio provides a streamlined approach to indexing and capturing paper based files. Walk-up and scan your daily document workflow utilizing the convenience of digital copiers and network scanners.



Electronic Files

MS-Office files, miscellaneous files and e-mail are indexed, captured and automatically stored with the supporting scanned paper files.



Dedicated Desktop, Wide Format and Production Scanners

Offering a full line of software tools to achieve productive conversion and indexing of office documents from paper to searchable electronic PDF files.



WebSearch displays 4 panes. The top pane displays user interests such as “Search”, “View”, “Tools” and “Help”. “Admin” access will only display if the user is granted administrative permissions. For the general purpose of this demonstration, Admin and document manipulation privileges are not available.

The left pane is a document navigation tool for finding desired information. The right upper pane displays text descriptions of the search results. The right lower pane displays the desired documents and processing messages. The color scheme, field names, results display and company logo branding may be changed by the system administrator.

Top pane

Left pane

Upper right pane

Lower right pane

The screenshot shows the DocuLex WebSearch interface. At the top is a navigation bar with tabs for Search, View, Tools, Admin, Help, and Log Off. The user is logged in as 'tdgen1'. The interface is divided into four main panes:

- Top pane:** Contains navigation icons for VFolders, File rooms, and History.
- Left pane:** A search navigation tool with a 'Search For' input field, a 'Manage Saved Results' button, and a list of search criteria: Client Name, Client Number, Document Type, Document Date, and System Status. It also includes 'Advanced Options' with checkboxes for Fuzzy, Stemming, Phonic, and Natural Language.
- Upper right pane:** Displays a large 'WebSearch' watermark and a text box explaining the 'Search Results Display' area.
- Lower right pane:** Displays another large 'WebSearch' watermark and a text box explaining the 'Document Display' area.

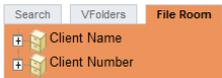
Yellow arrows point from the labels on the left to the corresponding panes in the screenshot. Text boxes with arrows point to the search results and document display areas.

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Documents may be located using proximity searching, by drilling through folders and subfolders as you would find a file with the Windows Explorer . These folders are created **automatically**, based upon the index values (meta data) of each document. Many users find comfort in seeing their documents filed away in logically named folders as they would in their present paper filing system.

Step 1

Select the
"File Room" tab.



Expand



"Client Name"
and



"Client Number"

A screenshot of the DocuLex WebSearch application interface. The top navigation bar includes 'Search', 'View', 'Tools', 'Admin', 'Help', and 'Log Off'. The user is logged in as 'tdgen1'. The main content area is divided into two panes. The left pane, titled 'File Room', shows a hierarchical tree structure with folders under 'Client Name' and 'Client Number'. The right pane displays the 'WebSearch' title and two informational boxes: 'Search Results Display' and 'Document Display'. The bottom of the interface features a footer with the text 'Powered by WebSearch™ (build 4.091), Copyright 2005-2007, DocuLex, Inc., All rights reserved.'

Simply click on a folder, then document description, and your desired document file opens for your review, printing and sharing.

Step 2

From the “Client Name” cabinet, expand the “Associated Computers” folder.

Select the text “Office Memo”.

The results will display the first document .

Depending on your internet bandwidth, the first document may take 3-10 seconds to display.

The screenshot displays the DocuLex WebSearch interface. On the left, a file tree under 'Client Name' is expanded to show the 'Associated Computers' folder. The main area shows search results for 'Office Memo' documents. The first result is selected, and its content is displayed in a preview window below.

Select	System File Name	Client Name	Client Number	Document Type	Document Date	Version	System Status	System Security
<input type="checkbox"/>	Associated Comp...	Associated Computers	20400	Office Memo	08/26/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu...	Associated Computers	20400	Office Memo	08/14/02	1	Indexed	Public

The document preview shows the following text:

Interoffice Memo

To: Sandy Tompkins
From: Sally Smith
CC:
Date: April 14, 2007
Re: Check Attached

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The user may also type in one or many field values, such as client name or number and retrieve their desired documents with this method. Millions of files with various types can be discovered in seconds, even email and attachments.

Step 3

Select the "Search" tab.

Search Workspace File Room

Type "associated computers" into the Client Name field and select the eyeglass icon



or press enter.

The results will display the first document.

The screenshot displays the DocuLex WebSearch interface. The top navigation bar includes "Search", "View", "Tools", "Admin", "Help", and "Log Off". The "Search" tab is selected. The search results table shows the following data:

Select	System File Name	Client Name	Client Number	Document Type	Document Date	Version	System Status	System Security
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Settlement	09/01/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Order Transferring	08/03/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Office Memo	08/26/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Office Memo	08/14/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Notice of Hearing	09/12/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Motion to Dismiss	08/23/02	1	Indexed	Public

The first document is displayed in the preview window. The document header reads "Cason & Lewis, P.A. ATTORNEYS AT LAW". The contact information for James L. Cason, Esq. is provided: Telephone: (863) 512-5475, Facsimile: (863) 512-5476, Email: jcason@casonlewis.com. The date is June 16, 2007. The recipient is Amy Tindell, Associated Computers, P.O. Box K, Smithtown, FL 12345. The subject line is "Re: Associated Computers v. White Products Company Defendant's statutory Proposal for Settlement".

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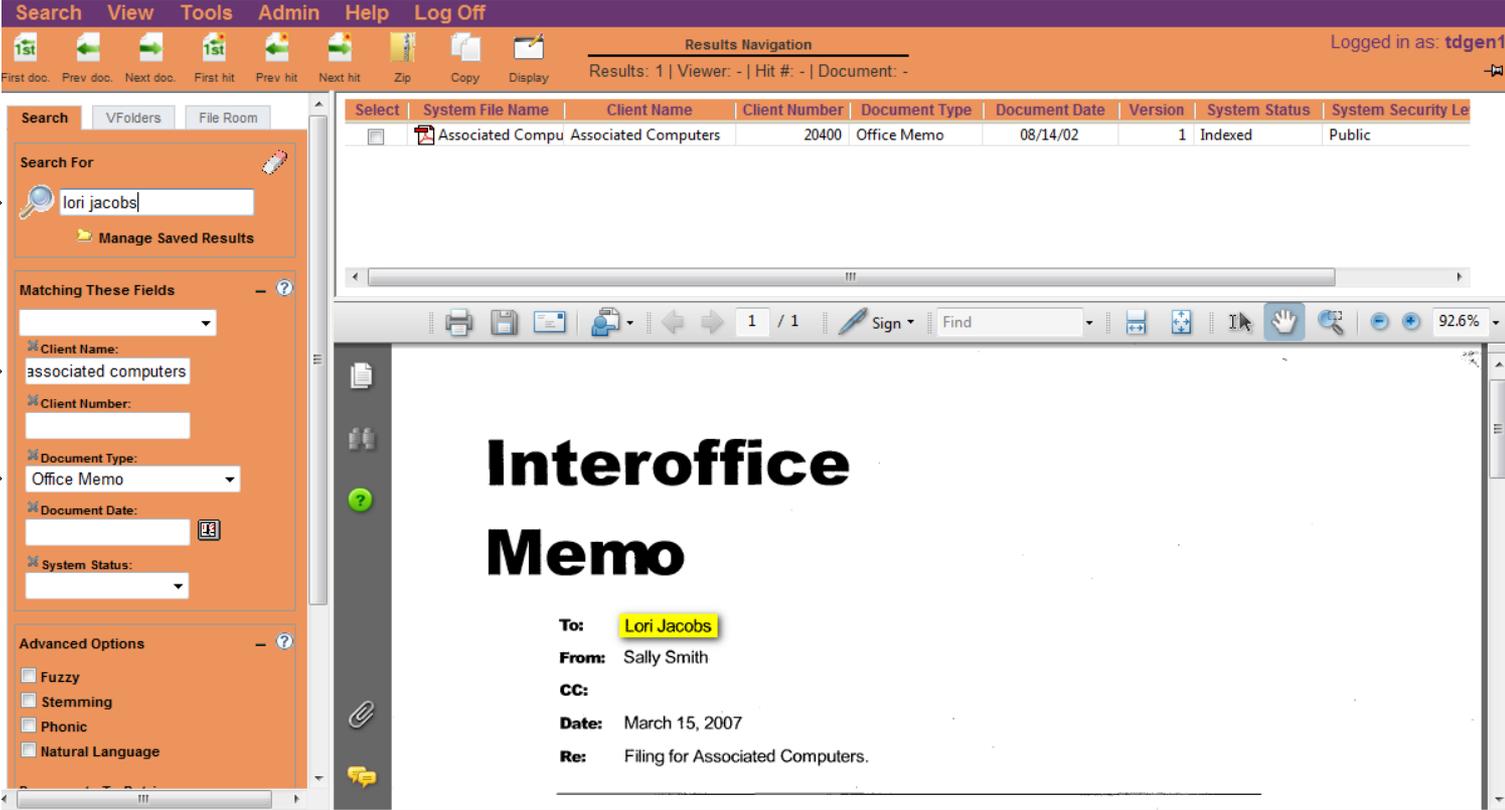
You may also combine field values with any typed text on the document in order to narrow down the search to the page level of a document. Any document in their native format, whether it's a scanned file, a MS-Word document, Excel file or even email may be located with WebSearch.

Step 4

Leave "associated computers" in the Client Name field.

Select "office memo" from the Document Type drop down, then type "lori jacobs" in the full text field located next to the eye glass.

Press enter or select eye glass to search.



The screenshot displays the DocuLex WebSearch interface. The search results table shows one result:

Select	System File Name	Client Name	Client Number	Document Type	Document Date	Version	System Status	System Security Le
<input type="checkbox"/>	Associated Compu	Associated Computers	20400	Office Memo	08/14/02	1	Indexed	Public

The document preview shows the following content:

Interoffice Memo

To: Lori Jacobs

From: Sally Smith

CC:

Date: March 15, 2007

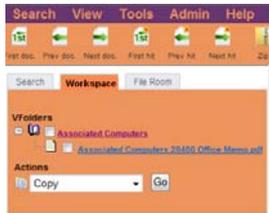
Re: Filing for Associated Computers.

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Collaboration with others is available with “workspace”. The user has the option to generate working folders in the workspace section, designed as a secure virtual work place for sharing information about common projects with others. Copies of files may be located in these folders and shared with only those invited. The original documents are still archived for access by others.

Step 5

Select the
“**Workspace**” tab.



This document was
selected from the
search results, copied
from the top pane



and then pasted into
the “Associated
Computers” folder.

Search View Tools Admin Help Log Off

Results Navigation

Logged in as: tdgent

first doc. Prev doc. Next doc. First hit Prev hit Next hit Zip Copy Display

Results: 1 | Viewer: - | Hit #: - | Document: -

Search Workspace File Room

VFolders

- Associated Computers
- Associated Computers 20400 Office Memo.pdf

Actions

Copy Go

Search Results Display - Documents matching your search criteria are listed in this area. The search form is accessed by selecting the *Search* tab at the top of the frame appearing along the left edge of this page. Also, note that you may search on specific document meta fields by selecting them from the *Select Fields* list of the search form.

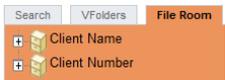
Document Display - By clicking on links for documents listed in the *search results display* area you may view the full document here as either highlighted raw text, or in it's native viewer. Additionally, this frame is used for input when operating on groups of documents which have been selected (such as when zipping selected documents or uploading over one or more selected documents).

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Return to the File Room and see some of the **Document Control** capabilities.

Step 6

Select the
“File Room” tab



Expand



“Client Name” and
“Client Number”.

Expand



the “Associated
Computers” folder.

Select the text “Office
Memo” and the first
document in the results
display will appear.

Search View Tools Admin Help Log Off

Results Navigation
Logged in as: tdgen1
Results: 2 | Viewer: BROWSER | Hit #: - | Document: 1

Select	System File Name	Client Name	Client Number	Document Type	Document Date	Version	System Status	System Security
<input type="checkbox"/>	Associated Comp...	Associated Computers	20400	Office Memo	08/26/02	1	Indexed	Public
<input type="checkbox"/>	Associated Compu...	Associated Computers	20400	Office Memo	08/14/02	1	Indexed	Public

Client Name

- Amstar.18300...
- Associated Computers.20400
 - Correspondence...
 - Exhibit...
 - Invoice...
 - Miscellaneous...
 - Motion to Dismiss...
 - Notice of Hearing...
 - Office Memo...
 - Order Transferring Venue...
 - Settlement...
 - Subpoena...
 - Witnesses...
- Beam Industrial Inc..19500...
- Beam Industrial Inc..19500...
- Cain Cattle Co..19100...
- CCD Inc..20300...
- Hamilton Fruit Co..20500...
- Hatton Insurance.18200...
- Insignia.18000...
- Lykes, Inc..19300...

Interoffice Memo

To: Sandy Tompkins
From: Sally Smith
CC:
Date: April 14, 2007
Re: Check Attached

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So far we have covered the primary “Document Access” capabilities of WebSearch. Now let’s cover an equally important capability, which is “Document Control”. Since document access is now convenient and electronically available, controls must be present to insure that only the qualified users have access to the documents in which they have permission. **To maintain the integrity of this demo site, permissions on many of the control features have been disabled.**

Step 7

Right click the mouse over one of the records in the results pane and a document control window will pop up.

Display options, update properties, update permissions, check-out and check-in all pertain to document security and control.

Feel free to select one but **permissions are limited.**

The screenshot displays the DocuLex WebSearch interface. At the top, there is a navigation bar with menus: Search, View, Tools, Admin, Help, Log Off. Below this is a toolbar with icons for document navigation and actions. The main area is divided into a left pane labeled 'File Room' and a right pane. The 'File Room' pane shows a tree view of folders and files, including 'Client Name', 'Amstar.18300...', 'Associated Computers', 'Correspondence...', 'Exhibit...', 'Invoice...', 'Miscellaneous...', 'Motion to Dismiss...', 'Notice of Hearing...', 'Office Memo...', 'Order Transferring Venue...', 'Settlement...', 'Subpoena...', 'Witnesses...', 'Beam Industrial Inc..19500...', 'Beam Industrial Inc..19500...', 'Cain Cattle Co..19100...', 'CCD Inc..20300...', 'Hamilton Fruit Co..20500...', 'Hatton Insurance.18200...', 'Insignia.18000...', and 'Lykes, Inc..19300...'. The right pane shows a document preview titled 'Interoffice Memo' with the following content:

Interoffice Memo

To: Sandy Tompkins
From: Sally Smith
CC:
Date: April 14, 2007
Re: Check Attached

A context menu is open over one of the records in the 'File Room' pane, showing the following options: Display in Browser, Display Hits, Update Properties, Display Text, Check-In, Update Permissions, Display Native, Check-Out, Delete, and View context. The 'View context' option is highlighted.

At the bottom of the interface, there is a footer: Powered by WebSearch™ (build 4.091), Copyright 2005-2007, DocuLex, Inc., All rights reserved.

The Organization administrator can create multiple communities with common document collection interested and permissions. Individual communities may have multiple levels of security to protect sensitive information. System Status is utilized for workflow.

If the user has permission, documents may be checked out for manipulation and checked in with automatic versioning. WebSearch controls checked out documents and version updates.

Step 8

From the upper right pane, slide the display bar to the right .

The screenshot shows the DocuLex WebSearch interface. On the left is a 'File Room' pane with a tree view of folders under 'Client Name'. The main area is divided into two panes. The upper right pane contains a table with document metadata. The lower right pane shows a preview of an 'Interoffice Memo'.

Version	System Status	System Security Level	System Community
1	Indexed	Public	Users
1	Indexed	Public	Users
1	Indexed	Public	Users
1	Indexed	Public	Users
1	Indexed	Public	Users
1	Indexed	Public	Users

Interoffice Memo

To: Sandy Tompkins
From: Sally Smith
CC:
Date: April 14, 2007
Re: Check Attached

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DocuLex WebSearch Demo

This is a general demonstration. The following topics are available and should be mentioned but are not covered by this document. Contact your local solutions manager or DocuLex representative to assist with a more detailed demonstration. DocuLex 863-297-3691 x236 www.doculex.com or access@doculex.com.

- ➡ SSL connection
- ➡ Active directory integration
- ➡ Secure encrypted links to WebSearch
- ➡ Connection to line-of-business applications with the DocuLex Connector or API
- ➡ Site, Organization and Community Admin settings
- ➡ Setting document permissions at the community and document level
- ➡ Creating and setting organization security levels
- ➡ Creating document status descriptions
- ➡ Personal Inbox routing
- ➡ Custom field names and drop down lists
- ➡ Upload and indexing of all file types
- ➡ Capture of electronic files and email from the desktop
- ➡ Connection to SQL server
- ➡ Hosting or Utilizing WebSearch as a service
- ➡ Email Archiving
- ➡ Records retention policies and procedures
- ➡ Document Workflow
- ➡ Paper Capture and Indexing (Goby Capture, Office Capture, Pro Capture and 3rd party capture products)
- ➡ MFP touch panel paper capture and indexing