



## iDoc Product Spec Sheet

- **Adding and Organizing Documents In the iDoc Database**
  - Scanned, imported, and interfaced documents are stored in the iDoc database in client-defined record sections (i.e. client-defined tabs) in either .tif or .pdf formats
  - Ability to accept electronic feeds from all major systems to include all existing electronic image-based information
  - Automatic indexing using barcodes or manual indexing
  - Move or copy documents from one record to another
  - Add documents at a later date to existing records
  - Scanning
    - Dynamic thumbnail view of scanned documents with ability to expand thumbnails to inspect documents prior to saving
    - Batch or individual document indexing, any size documents
    - Image enhancement capability while scanning (i.e. lighter, darker, rotate, delete)
    - Color-coding to support quality control during scanning
    - Configurable scanner settings
    - Accept scanned documents from external sources
    - Scanning of all types and sizes of documents
- **Retrieving / Viewing Records and Documents**
  - Ability to retrieve documents through the use of search keys (i.e., the indexes established by client)
  - Establish preferred documents by User
  - Ability to print, fax, export, or email retrieved documents subject to security authorizations
  - Ability to generate export files (supports external document scanning sources)
- **Business Record Workflow**
  - Ability to establish work queues for specified tasks and with specified notes and rules
  - Ability to send documents to back-end work queues such as Problems, Quality Assurance, and Indexing
  - Electronic signatures
  - Ability to make notes either directly on documents or appended to them
  - Multi-color highlighting on documents
  - Redacting capability to blind sensitive information such as SSN
  - Attach customized addendums or other predetermined standardized verbiage to an existing document

- Automatic queuing of records for task assignment based on your criteria
- Task assignment support and markup of record – needs approval, amendment, signature, review
- Tasks assignment to appropriate Users
- User completion of assigned tasks supported with system-guided walkthrough of assigned tasks
- Ability to manage / approve requests for access to records
- Additional reports to support record completion of tasks and related manual processes
- **Document Routing**
  - Based on report type and associated User preference
  - Printing, Faxing (requires fax server), E-mailing of documents (requires email server)
  - Different rules for preliminary and final documents
- **Administration & Management**
  - Add/Maintain
    - User information such as user ID/password,
    - User groups and permissions (record access, printing, faxing, emailing)
    - Permissions based access by index fields such as, location, department, tab
    - Document types and record tabs
  - Home Page
    - Summary of a User's active records and documents
    - iDoc messaging for dynamic communication between users
    - Task work queue that identifies all records and documents assigned to user – with assignments being created through one or more of the following: electronic interface(s), request / assignment, or tagging of record through work queues
- **Configurable Reporting**
  - Audit trail –all actions performed either by record or user
  - Batch details – detailed information on uploaded batch documents
  - Document routing status – information on all documents automatically routed
  - Productivity – lists all actions performed by specified user or user groups
  - User group permissions - detailed information on user group permissions
  - Users – detailed report on all users registered in the system