



Document Imaging System Feature List

Feature List

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Search/Browse Features

- Quick search using partially-qualified search criteria
- Advanced, complex search (multiple criteria or boolean search)
- Full text searching (when images are scanned with OCR)
- Search for a specific Version of a file
- Search by Check Out person
- Administrators can search admin related data (folder types, events, users, etc.)
- Folder hierarchy retained with image search results
- Search results filtered within the established permissions
- Search within parent or subordinate folders
- Customized searches can be named and saved for later reuse
- Image thumbnails for quick file identification
- Easily scroll through images within each document
- Ability to save custom/frequent searches with a tag name to a user's profile. Can also save shortcuts to the searches on the computer/desktop. Opening the shortcut results in automatically performing the search inside ES Imaging.

Index Features

- Dynamic Index Structures
- Customizable indexing using text boxes/areas or drop down list
- Unlimited and customizable keyword values
- Option to retain last index value (saves indexing time)
- Consistent naming with Dynamic Naming feature
- Predefined indexing properties and settings by administrators

Capture Features

- Mass/batch import ability
- Import from Windows, Linux or Mac
- Import using Scan/Capture from digital camera (or mobile device)
- Import from a mobile device's camera roll
- Import Electronic Files (TIFF, PDF, Word, Excel, CAD, etc...)
- Import Electronic Documents from an existing system
- Mass/batch import of emails from a POP email server.
- Scan Single or Multiple Documents (black & white or color)
- Individual Capture Queues with established permissions
- Import directly into folder (bypass indexing)
- Monitor a selected directory continuously for new files that arrive real time
- Print directly into ES Imaging using the ES Image Printer Driver
- Import files from Windows Explorer with the ES Image Clipboard Monitor
- Administrators can setup batch imports from a network drive. The folder structure can even be preserved
- Automatic optimized image compression based on color format of file
- ES Image Clipboard Monitor can allow files, html, and images copied to the clipboard to automatically route into ES Imaging

Image Markup/Manipulation

- Redactions (black out confidential/sensitive areas of images)
- Annotations (hidden notes/comments)
- Text overlays (appears on top of the images)
- Highlighting (various colors)
- Drawing freehand shapes/lines
- Ability to overlay other images, electronic signatures, etc. (appears on top of the images)
- Ability to create watermarks on images.
- Scaling and rotation of images
- Ability to view individual pages inside a PDF, even on devices that don't support PDF.
- Ability to permanently embed markups into an image.

File Features

- Open one or more files in the operating system's default/external viewer (Word documents, HTML, CAD drawings, emails, etc.)
- Files can be streamed and viewed with the native operating system program. This is useful for videos (WMV, MP4, etc), sound files (MP3, WAV, etc), etc.
- Shortcuts to files can be saved on a user's computer/desktop. Opening these shortcuts through the Operating System results in automatically viewing them inside ES Imaging.
- Ability to merge multiple PDFs into a single PDF. The rules can be completely controlled so that specific pages are extracted and done so dynamically based on conditions.
- Ability to attach any file and send as an email through ES Imaging

Access Features

- Remote access via HTTP or HTTPS
- Flash client to order to access with no installation required
- Adobe AIR client access for a richer client experience
- Web Service server interface for developers and integration

Versioning Features

- New versions of files can be created that have their own keywords and image markups
- Each version can have different security settings
- Each version can be checked out by different people at the same time
- Specific versions can be overwritten/replaced or new versions created
- ES Imaging can detect when externally launched files are modified and prompt user if they want to replace or create a new version on the server.
- Version rollback

Security Features

- Login id/password protection for users
- Secure files at any level based on action (view, update, delete, etc.)
- Manage permissions using users or groups (maximizing control of permissions, while minimizing administration)
- Segregation of duties for indexing, viewing, etc.
- Segregation of administrative duties, such as security, user activity, folders, keywords, etc.
- Allows mass update of permissions
- Enables hierarchical security via propagation to all subordinate folders

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- Records audit information of all activity (view, update, delete, etc.)
- Viewing of audit information at network, database and permission level
- Provides encryption from client to server via HTTPS
- A user has the ability to encrypt individual files with a specific password. Not even the administrator will have access to the files without knowing the password.
- Administrators can setup specific folders (recursively as well) to have their contents automatically encrypted using a password. This process is transparent to the end user.
- Optional electronic file shredding to guarantee files are permanently destroyed
- HIPAA compliant

Workflow Features

- Document and file check in/out
- Setup queues assigned to a single person (personal) or multiple people (group)
- Setup automatic routing rules for workflow items based on 1 or more conditions
- Users can manually check out files and folders
- Administrators can setup rules to automatically check out files and folders to specific people
- Complex workflow paths can be created to support concepts such as rendezvous
- History for all changes can be viewed in order to see who made what changes, and when
- Ability to notify users of workflow items via email
- Collaboration among users with notes, image markups, and keywords

Document Retention Features

- Ability to control all document retention rules with a wide variety of search criteria (create date/time, last update, who has something checked out, a keyword value, where it is in workflow, etc.)
- Ability to automatically delete or move folders and files
- Ability to automatically export folders and files to a server/network file path
- Ability to automatically import folders and files from the server/network file path
- Administrators can setup rules for files to be sent to a 'Recycle Bin' on deletion. This happens through the Event system, so any type of rule can be used (based on User, Folder Type, Location, Keyword, etc).

Email Features

- Mass/batch import of emails from a POP email server
- Ability to monitor and filter any POP email account. Emails can automatically be deleted based on various criteria (Subject, Message Body, Attachment File Names, Date Sent, etc). Great for SPAM management.
- Ability to notify users of workflow items via email
- Ability to forward captured emails to any email address
- Ability to attach any file and send as an email through ES Imaging

Event and Trigger Features

- Supports over 45 event types so administrators can control virtually any business rule or process
- The follow event types are supported: Add Number, Batch Email Delete, Batch Email Import, Batch Import, Batch Save, Call URL, Change Folder Type, Change Keyword Value, CheckIn, CheckOut, Compress, Decompress, Copy, Create Folder, Create Image Overlay Markup, Create Text Overlay Markup, Create Workflow Item, Delete, Disable History, Divide Number, Enable History, Encrypt, Execute Multiple Events, Execute Program, Export, Extract Email, Flatten Image, Insert Database Record, Merge PDF, Move, Move Volume, Move Workflow Item, Multiply Number, OCR, Process Dynamic Name, Propagate Security, ReEncrypt, Rename, Replicate Volume Engine, Search, Send Email, Sleep, Subtract Number, Synchronize Records, Throw Error Message, Write to Log.
- Ability to trigger events based on 1 or more conditions.
- Ability to trigger events based on a specific action (save, delete, etc)
- Ability to trigger events based on a schedule (hourly, daily, etc).
- Ability to trigger events on demand.
- Events can be chained together and triggered sequentially
- The order of sequenced events can be controlled to ensure steps are followed in order
- A wide variety of conditions can be tested for triggers. Just a few examples are: name, keyword value, id, create time, last update time, version, checked out by, folder type, parent id, parent name, etc.
- Dynamic tags can be utilized to make real time programmatic calculations and evaluations. A few examples are: date, month, day, year, name, last update time, version name, login id, checked out login id, child count, substring, dateformat, etc.

Supported Image Formats

- PDF
- PNG
- JPEG
- GIF
- TIFF
- BMP
- JPEG 2000
- FPX
- PNM

Other Features

- Ability to have multiple sessions open at the same time
- Supports Windows 2000+ (2003, 2008, NT, XP, ME, Vista, 7, 8, etc)
- Supports Linux and Mac OS X
- Supports iOS 4.3+ mobile devices (iPhone and iPad)
- Supports Android 2.3+ mobile devices with ARM v7 processors
- Can rapidly integrate with other business systems because of the flexible architecture and modularity
- Automatic updates for clients (Flash and AIR)
- Open database design to allow system integration and external reporting
- System administrators can broadcast messages to users logged in the system

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- Centralized or decentralized storage capabilities with ES Imaging's Volume Engine architecture
- Support of any language/character set (Unicode characters supported).