

## What to look for in Electronic Document Management System (EDMS)

Every customer should view EDMS as a strategic asset to their business; after all, the system manages the business vital records. EDMS by their nature are complex systems, but for the majority of the Small/Medium Business (SMB) customers the following requirements are sufficient:

### Database Format

The database engine should support the ODBC standard, and the data is written in non-proprietary format.

### Number of Databases allowed

Many software vendors sell their products with limitation on how many databases the system will support. Make sure you are getting the product that has no limit on the number of databases you can create. SimpleDOX does not restrict the number of database you can have.

### Imaging Data Format

The imaging file format should also be non-proprietary. Many electronic record management (ERM) experts insist on using TIFF image format since numerous Federal and State regulations related to ERM specify TIFF as the acceptable file format. Many EDMS software vendors use the GIF/JPEG image format for their files to save on space without paying attention to these possible legal issues when data archives or backups are created.

### Storage of Imaging data files

There are two types of data that EDMS stores, the index data (text) that is used by the system to find the record, and the image file created by the capture process. A common method used by many software vendors is to store the index data and the image file within the database file, which creates limitations on how many records the database can store, and performance issues as the database grows in size. A more superior and complex implementation used by other vendors including iScan, stores only the index data in the database, and the image data files is in a separate folder system independent from the database engine file. Using this schema allows for more imaging data to be processed and performance is optimized.

### Exporting Data

A common business practice for most businesses is exchanging data with their partners, and because other businesses may use different file format, the customer must make sure that the EDMS allows data export to industry standard formats.

### Archive and Backup to CD-R media

Most businesses use data archive/backup for the following objectives:

- Disaster recovery.
- Free up storage space and optimize server performance.
- Free valuable office space by destroying their paper records since these records exists on non-editable CD-R media.

However, many overlook the fact that storing data on CD-R is not enough to create an electronic legal copy of the paper document and therefore, one can not destroy the paper documents. Federal and State regulations specify rules to be met before an electronic record is considered acceptable as a legal copy of the paper original. Good examples of some of these regulations are the HIPPA and Sarbanes-Oxley.

## Search and Retrieval

Searching and retrieving is a primary function of any EDMS. Businesses should evaluate the search engine capabilities and make sure they can search using:

- By text content. This requires the ability to perform OCR on the document.
- By Index field data. This is the most efficient way to locate records in the database. Make sure the engine support logical operators to find records.
- Virtual Filing System (VFS). The VFS is a virtual directory system similar to windows explorer used to organize SimpleDOX documents. You can use the VFS to browse and find any document in the system.

## OCR

Optical Character Recognition (OCR) is a very powerful tool to create text documents from images. The legal business community uses this technology extensively to perform legal case research and discovery; another use is format conversion, and in this case, businesses can scan their paper documents such as reports and apply OCR to convert them to Microsoft word or PDF document.

## License Type

Most software vendors sell user licenses in one of two types:

- |             |   |
|-------------|---|
| Fixed:      | In this case, only a fixed number of workstations are allowed to access the system at any given time. |
| Concurrent: | In this case, only a fixed number of users are allowed to access the system at any given time.        |

In our opinion, "concurrent" license type provides more flexibility and advantages to the business than the "fixed" type.

*iScan user licenses are of the "concurrent" type.*

## License Class

Licenses are sold in one of two types:

- |       |  |
|-------|--|
| View: | Allows the customer to search, retrieve, and view their documents                  |
| Full: | Allows the customer to capture documents in addition to the View license features. |

*iScan user licenses are of the "full" class type.*