

DOCUMENT MANAGEMENT

Evo3: FIND WHEN YOU DON'T KNOW WHERE TO LOOK



Merlin created DocuStor to provide low-cost management of scanned documents. There are many Electronic Document Management products on the market but they are, in the main, expensive and over-engineered for, what is in most cases electronic filing. Alone among its rivals, DocuStor does not charge for user licences, irrespective of numbers.

There are just six elements to master, and you can run your own document management system. These are:

- **Set up users and administrators**
- **Set up volumes**
- **Scan to PDF**
- **Upload to web**
- **Index on-line**
- **Search and retrieve**

Evo3 is the latest development of DocuStor that offers complete flexibility in creation and configuration of searchable fields introduced in Evo2, but also the ability to search document content using state-of-the-art search engine technology.

It also provides advanced encryption facilities that offer total security from unauthorised access.



Easy to use

DocuStor comprises three modules:

SUPERUSER to create new users, allocate them permissions and create and modify access levels.

ADMINISTRATOR to add, delete and amend documents in the system, create and amend metadata, and allocate documents to user access levels.

USER who can search retrieve, view, print and email documents up to their access level but cannot make any changes.

The appropriate module is opened at log-in:

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User Name

Password

There is only one SuperUser, who may change his or her password frequently to ensure security, but this person can allocate as many Administrators as is required. Everyone else is, by default, a Search User who can see documents with an access level allocated to them by the SuperUser and all levels below. Each module has clear instructions for use included in the page.

SUPERUSER Module

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SuperUser Home Log Off

Change Superuser Password

Repeat Password:

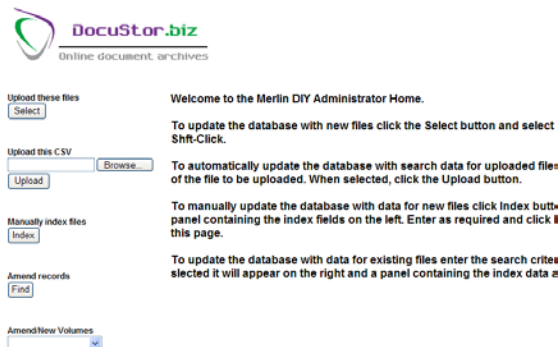
Welcome to the DocuStor.biz SuperUser Home.
The SuperUser is the only class of user that can create other users and give them permissions. There should be only one per subdomain.
Administrators may access, append and amend documents and metadata within the subdomain under the control of the SuperUser.
User groups are created at the request of the nominated Document Controller within the subdomain user department and should be used sparingly with clear easily understandable access level descriptions. Users in each group may access documents allocated to that level. You may also specify non-additional groups to which users will have 'read only' access. User Group 0 means available to all users with access to the subdomain and User Group 9 is reserved for Administrators.
Each new user must be allocated to a user group as per the request of the Document Controller within the subdomain user department.

AMENDNEW ADMINISTRATOR Admin User Name: <input type="text"/> User Group: <input type="text"/> Additional Group: <input type="text"/> Additional Group: <input type="text"/> Administrator Password: <input type="password"/> Repeat Password: <input type="password"/> <input type="button" value="Submit"/>	AMENDNEW USER GROUP User Group: <input type="text"/> Description: <input type="text"/> <input type="button" value="Submit"/>	AMEND NEW USER User Name: <input type="text"/> User Group: <input type="text"/> Additional Group: <input type="text"/> Additional Group: <input type="text"/> User Password: <input type="password"/> Repeat Password: <input type="password"/> <input type="button" value="Submit"/>
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This module gives the SuperUser the ability to create and amend user groups. He or she can then create new administrators and search users, amend permissions for existing administrators and search users, allocating them to up to three user groups, plus the "available to all" user group 0.

For security reasons, only one SuperUser is permitted for each installation.

ADMINISTRATOR Module



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Upload these files

Upload this CSV

Manually index files

Amend records

Amend/New Volumes

Welcome to the Merlin DIY Administrator Home.

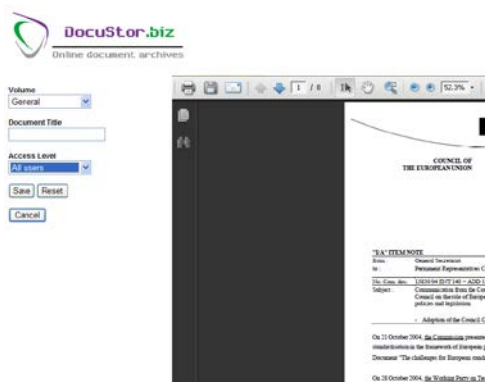
To update the database with new files click the Select button and select Shift-Click.

To automatically update the database with search data for uploaded files of the file to be uploaded. When selected, click the Upload button.

To manually update the database with data for new files click Index button containing the index fields on the left. Enter as required and click this page.

To update the database with data for existing files enter the search criteria selected it will appear on the right and a panel containing the index data

Documents are scanned to a pre-defined location. These may be then uploaded to the web site en masse, and indexed in one of two ways – by importing a csv file with the metadata related to each document image file, or manually, whereby the system displays each unindexed file in turn and provides fields for the Administrator to complete.



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Online document archives

Volume:

Document Title:

Access Level:

COUNCIL OF THE EUROPEAN UNION

TA ITEM NOTE

Doc: General Document
Reference: Parliament: Council
Doc. Ref.: [L19340/01 - ASD 1](#)
Subject: Communication from the Council
Council on Security for European
patents and royalties

... Adoption of the Council's Code

On 11 October 2004, the Commission presented its
communication to the European Parliament
Document: "The challenges for European roadmaps"

On 18 October 2004, the Working Group on the

Using the Amend Records facility, an administrator can open existing documents which are displayed with metadata in edit mode so that any changes can be made and saved.

The top-level split is the Volume, more or less equivalent to a filing cabinet containing documents of a particular type. Up to four formatted index fields can be distinctly configured for each and a user group allocated, defining who can access them:

AMEND/NEW VOLUME

Volume Name:

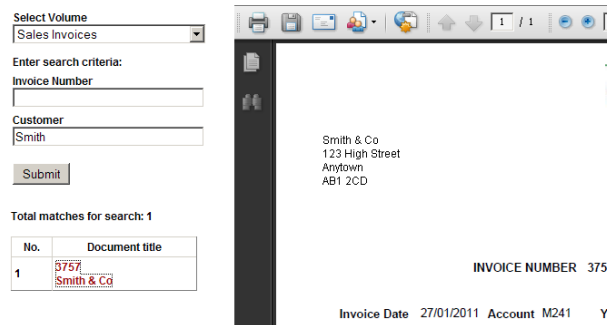
Usergroup:

Roll-up Level: None Field 1 Field 2

Field	Field	Mandatory?	Format
1	<input type="text" value="Customer Name"/>	<input checked="" type="radio"/> Mandatory <input type="radio"/> Optional	Integer
2	<input type="text" value="Date"/>	<input type="radio"/> Mandatory <input checked="" type="radio"/> Optional	Money
3	<input type="text" value="Order No"/>	<input checked="" type="radio"/> Mandatory <input type="radio"/> Optional	Date
4	<input type="text" value="Customer Ref"/>	<input type="radio"/> Mandatory <input checked="" type="radio"/> Optional	Text

USER Module

If you know where to look, choose a volume (only those available to the user's designated user group will be displayed) and the appropriate fields will be displayed. Enter any character string (remembering to use % for a wildcard) in the field and press submit, then a list of documents satisfying the criteria will be displayed. Click on one to display the document in the right hand window:



Select Volume
Sales Invoices

Enter search criteria:
Invoice Number
Customer
Smith

Submit

Total matches for search: 1

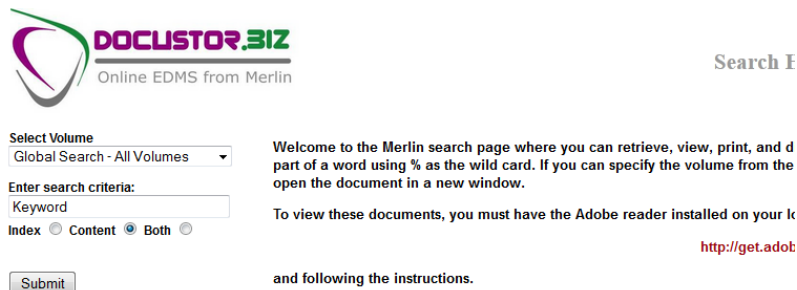
No.	Document title
1	3757 Smith & Co

Smith & Co
123 High Street
Anytown
AB1 2CD

INVOICE NUMBER 3757

Invoice Date 27/01/2011 Account M241 Yo

Global Word Search is the new and powerful feature of Evo3 that allows you to find documents even if you don't know where to look. It uses the very latest search engine technology to find documents containing keywords that you know are somewhere within the content. It is lightning-quick and can search a library with many hundreds of thousands of pages and return results in less than a second. It can even let you refine your search with new words and go back to the previous state.



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Search F

Select Volume
Global Search - All Volumes

Enter search criteria:
Keyword

Index Content Both

Submit

Welcome to the Merlin search page where you can retrieve, view, print, and d part of a word using % as the wild card. If you can specify the volume from the open the document in a new window.

To view these documents, you must have the Adobe reader installed on your k <http://get.adobe.com/reader/>

and following the instructions.

Just think of a word or phrase that will be somewhere in the document you're looking for and/or in its title fields. Just enter it and let Docustor do a lightning-fast search and display up to 25 results – any more and there would be simply too many to look through. In the example below, there are 958!



DOCUSTOR.BIZ
Online EDMS from Merlin

Select Volume
Global Search - All Volumes

Enter search criteria:
Contract

Index Content Both

Submit

Matches for search: 25 (of 958)

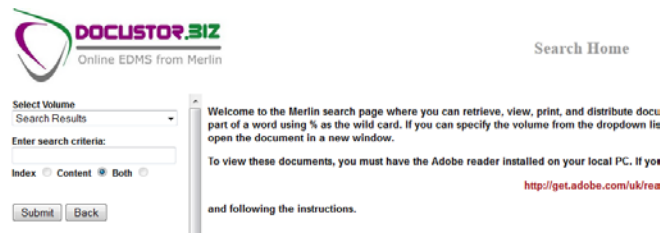
Document title
Contract Files
Anytown Hospital Works Health and Safety Part 4 Vol 2.1
Contract Files
Anytown Hospital Works O and M Manual Part 4 (Plan) Volume 2.1

Welcome to the Merlin search page where you can retrieve, view, print, and d part of a word using % as the wild card. If you can specify the volume from the open the document in a new window.

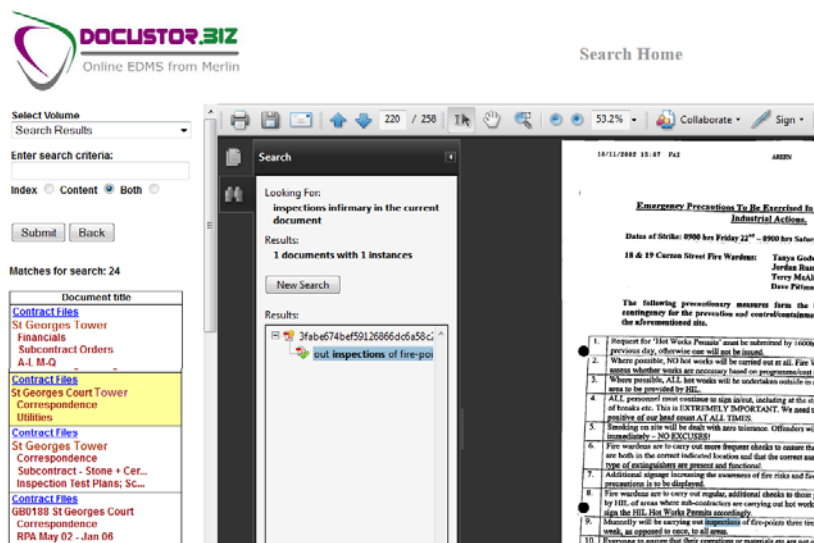
To view these documents, you must have the Adobe reader installed on your k <http://get.adobe.com/reader/>

and following the instructions.

So refine your search by searching the search results:



Try various words and combinations, returning to the previous state if you find you're up a blind alley, until you get down to a manageable number. The title data may be examined and a likely suspect chosen. By clicking on it, the document will open with a left margin containing a list of hits along with the first hit highlighted on the page itself:



Enhanced security

One of the principle concerns about cloud-based technology is whether or not it is secure against unauthorised access. It is impossible for someone to open a document file without logging in as an authorised user and as coding held on the database is re-encrypted each time a document is opened, we have created a hacker's nightmare.

Lowest cost of ownership

DocuStor offers simply the best value for money of any document management system on the market. Other low end products still end up costing many thousands of pounds which in these difficult times cannot be justified for digitising the filing system.

For any organisation looking to scan, store and retrieve its business documents but does not want to spend a fortune, DocuStor is the answer. The simplicity of the system has kept the development cost to a minimum, and even where a customised solution is demanded, the architecture has anticipated enhancements. So even in highly modified form the total cost is likely to be well below standard versions of its nearest rivals.

Best of all, there is no user licence cost – you buy the system and, via standard browser technology, any number of users can access the archives. The cost of access licences for rival products can often dwarf the price of the base module by a factor of many multiples, so DocuStor can offer an unrivalled return on investment.

