DocuLex Archive Studio Professional Edition 4.2.22

Archive Studio™ by DocuLex™

BUYERS LABORATORY 2010 BLI ★★★★★ SOLUTIONS

Feature Set .... ★★★★★
Value.. ★★★★★
Ease of Administration .... ★★★★★
Ease of Use .... ★★★★★
Compatibility .... ★★★★★
Software Integration .... ★★★★☆
Security .... ★★★★⯪
Dealer Support and Training.............. ★★★★★
Customer Support and Training .... ★★★★★
Documentation .... ★★★★★
Global Business Readiness.............. ★★★☆☆
Upgrade Path .... ★★★★★

OVERVIEW

DocuLex Archive Studio 4.2.22 combines a scan capture and routing tool with a document management repository to form a cohesive content management, workflow and document collaboration system. Noteworthy is that it's one of only a few offerings on the market that includes the archive component, Web-Search, and a robust scan component, Goby Capture, in a single package. Furthermore, except for additional logins for the repository, all features and functionality are standard so businesses receive everything up front. While Goby Capture and WebSearch can be implemented separately, DocuLex reports that approximately 95 percent of customers choose to purchase the suite.

The software helps organizations achieve greater efficiency, comply with regulations such as HIPAA and, most importantly, manage the lifecycle of myriad types of files. Once documents are scanned into the archive, or directly saved there from virtually any application, users can, among other things, search, retrieve, add metadata to and share files—all from a Web browser. Workflow is another part of the system and has been dramatically enhanced from the previous version. Powered by DocuLex's "decision engine," organizations can automate the structure of document exchanges so work activities have consistency and are accomplished efficiently and to completion.

The company states that Archive Studio has found a home in many vertical markets: accounting, legal, manufacturing, healthcare, education and human resources, as well as architectural, engineering and construction environments. Professional Edition—the subject of this report—is suitable for small and medium-size businesses. Small Office Edition is targeted at workgroups and departments, while Enterprise Edition is ideal for larger organizations that desire one content management solution to be used across all departments and/or locations.

What is Document Management?

Document Management, which is part of content management (often called enterprise content management, or ECM), enables users to organize and manage electronic documents created by a wide variety of applications. When used with scanners or MFPs, document management solutions help organizations convert paper documents into electronic files. This not only allows documents to be accessed far more quickly, but also enables users to much more easily collaborate on the information the documents contain.

Document management solutions are designed for businesses that need to enable their employees to work collaboratively or handle document-intensive processes that require many people to access and edit documents. These solutions are designed to aggregate and share content created in nearly any software application, and they often make files readable by users who don't have the associated software installed on their PCs.

Product Profile

Product: DocuLex Archive Studio Professional Edition

Version: 4.2.22

Software Developer: DocuLex, Inc., Winter Haven, FL

Minimum Server Requirements: 3.0-GHz Intel Xeon Core 2 Duo processor, with 4 GB RAM; Windows XP, Vista, Server 2003 or Server 2008; NTFS file system

Client Workstation Requirements: Windows XP, Vista or 7, as well as Mac, operating systems; Internet Explorer or Mozilla Firefox

Supported Devices: Goby Capture is compatible with MFPs and scanners that can output JPEG or TIFF files; it can also integrate with a fax server to grab incoming faxes. The scan piece can run as an embedded application on Ricoh-family and Sharp devices enabled with those manufacturers' open-architecture embedded platforms. Third-party touch-screen on-ramps such as EFI SendMe, Nuance eCopy ShareScan, and DigiDocFlow are also available.

Suggested Retail Price: $20,995. Goby Capture supports an unlimited number of users and devices, while 50 non-concurrent logins are included for Web-Search. Multiple users can access the archive through one login, or organizations can purchase 10-packs of logins for $3,000; discount thresholds are available. Embedded applications for supported Ricoh, Savin, Lanier, IKON and Sharp MFPs are available by request, free of charge. An annual maintenance agreement costs 20 percent of the total price of the system.

Support: DocuLex provides support to resellers and customers. Organizations must purchase a maintenance agreement, which allows for unlimited telephone and e-mail support, as well as providing free software upgrades and patches.

Availability: The solution is actively sold in North America, Latin America and the Caribbean by the Ricoh, Savin, Lanier, IKON and Sharp sales channels, as well as independently owned VARs.

⚠ What We Thought ★★★★⯪

Archive Studio Professional Edition has a host of impressive attributes. The capture and repository components are easy to use for administrators and users—a noteworthy achievement given the system's features that scale from basic to advanced. What's more, the solution doesn't force a massive change in organizational policies; Goby Capture simply enables a pop-up for users to fill out prior to scanning a document, while WebSearch is 100 percent browser-based. Archive Studio's pricing structure, whereby every capability is included except for additional WebSearch licenses—a refreshing change from the industry norm of a confusing menu of extra-cost add-on modules.

Goby Capture can process up to 10,000 files per day, cleaning up images and creating searchable content. From there, users can search the archive in several ways, add more metadata to files and collaborate on documents via the WebSearch SharePortal. The platform enables archival of hardcopy documents, as well as electronic files

Strengths

- Capture and archive components in a single suite form a cohesive content management, workflow and document collaboration system
- Allows for files to be scanned into the repository, or saved directly from virtually any application
- Straightforward pricing structure; almost all features and functionality are included, with no hidden fees for add-ons or plug-ins
- Robust set of scan features that work in the background, including image cleanup, text recognition, automated document break detection and barcode metadata creation
- WebSearch is 100 percent browser-based, reducing the burden on IT departments; the archive allows users to search for documents in a host of different ways
- Workflow features include automated activity routing, disapproval rerouting, task management, discussion notes, auto-notification and status reports
- WebSearch SharePortal allows for document collaboration between parties within and outside of the business
- Comprehensive reporting capabilities that cover activity, workflow, retention and privacy, which aids in regulatory compliance and e-Discovery
- Includes a developer API for integration with line-of-business applications
- Almost all support is handled by DocuLex; maintenance agreements enable organizations to upgrade to a major version release at no cost

Weaknesses

- Doesn't support scanning directly to Microsoft SharePoint or Lotus Notes
- No native support for scanning to encrypted PDF
- Though organizations in Europe and Asia have deployed the solution, it's only actively being sold in North America, Latin America and the Caribbean

saved from applications such as those in Microsoft Office. Adding to the package's functionality, administrators can establish comprehensive retention policies and, with the help of DocuLex, customize workflows for capture and storage. Activity logs and other reports aid in regulatory compliance, and organizations receive almost all support directly from DocuLex rather than the reseller. BLI believes Archive Studio is a strong content management system compared with others evaluated to date, especially as it includes the robust scan-capture component and the archive piece in one bundle.

Feature Set   ★★★★★

Whether it's the scan and routing piece or the repository, or both, Archive Studio offers an extremely robust feature set that includes basic, intermediate and advanced components for capture and storage. Though BLI evaluated Professional Edition, the identical functionality is available with Small Office and Enterprise Editions, save for the number of included WebSearch logins.

Goby Capture

Goby Capture can process up to 10,000 files per day, cleaning up images, creating searchable content and reducing manual labor. Users can scan to network folders, the desktop, fax, SMTP, FTP and the WebSearch client, and files can be sent to multiple destinations in a single scan. While the solution doesn't allow documents to be scanned to Lotus Notes and Microsoft SharePoint, users can upload PDFs to both applications with associated metadata. File formats include regular and searchable PDF, as well as PDF-A; users can create encrypted PDFs with a third-party application. Goby Capture can incorporate electronic documents—e-mail, Microsoft Office files and so on—and supports encryption for data transfer. And when a barcode cover sheet is used (see Ease of Administration and Ease of Use), the system automatically indexes scanned documents. The barcode cover sheets also allow for batch scanning.

The scan-capture component offers image enhancements such as despeckling, white-and-black border page deskewing, border removal, blank-page detection, auto-rotation and barcode indexing. Additionally, the solution supports Bates Stamping and image endorsing of and printing pages with Bates numbering. New features for this version include zonal text-recognition capabilities, which allow the engine to draw around specific document coordinates, then turn the image section into searchable text and assign it to designated metadata fields; zonal barcode reading; automatic document break recognition; advanced fault tolerance, which detects problems with images during processing and moves the file to an exception folder; problem image isolation without interrupting processing of other files, with auto-notification of problems via e-mail; and automatic polling of databases for

auto-indexing of documents. The OCR engine, which is sourced from Transym, has improved accuracy from 88 to 95 percent, according to the company.

Capture workflow is another key attribute of Goby Capture. The solution automatically routes documents based on content, while allowing administrators to establish custom workflows. Metadata is examined by Goby Capture; delivery of documents to WebSearch is based on the established values. For example, if metadata was "Acme Metal" for customer name and "12345" for the invoice number, the system would automatically generate a folder on the network named "Acme Metal" and a subfolder named "Invoice." The file would then be saved in the latter with the name "Acme Metal-Invoice-12345." This and many more types of workflow rules can be customized to meet an organization's needs.

WebSearch

WebSearch, the suite's document archiving and management component, is 100 percent browser-based, eliminating the need for administrators to install an application on each user's PC. The platform accommodates electronic files and digitized hardcopy documents in a range of formats, allowing users to quickly locate and review all of an organization's files for important decision-making information pertaining to a particular subject or issue. Users can download and print search results, move selected files to private collaboration work folders or simply print or e-mail the documents needed. Files that require editing or repurposing may be locked to other users by using the checkout/check-in feature.

The solution provides users with a range of ways to search, including keyword, wildcard and and/or methods, combining metadata searches with full text content. Users can also collaborate on documents stored in WebSearch; in fact, via the WebSearch SharePortal, which is similar to a secure FTP site, users can let people outside of the organization view files contained in WebSearch. SharePortal allows users to enter discussion notes and receive e-mail notification when a shared folder or document has had activity.

The system automatically indexes documents when users enter the archive from Goby Capture, while a standard ODBC connection auto-fills indexed metadata from line-of-business and general-purpose applications such as those in Microsoft Office.

In organizations, employees spend much time passing documents back and forth to support daily tasks. And like Goby Capture, WebSearch lets businesses set up workflows, which can be applied to specific document types and metadata values, and includes event triggers such as time, e-mail and required user intervention. DocuLex works with the business to discover where the "pain points" are, then puts together an XML file and uploads it to the organization's system. There are two types of workflows: business process, which is more set in stone and is utilized in environments that handle, for example, loans or purchase orders; and collaborative, which is more free-flowing and less hard-wired than a business process workflow.

The workflow engine, developed in-house by DocuLex, has been dramatically improved from the previous version and combines modern technologies—e-mail messaging, document imaging, etc.—with traditional paper-based styles like in/outbox shuffle. Timed and automated activities promise reliable on-time completion of business processes, which free up employees' schedules to be more creative and productive.

For example, in one typical business workflow a mortgage company initiates a new loan application. An agent is presented with workflow activity that requires eight mandatory documents, including an inspection, credit reports, appraisals, financial statements and so on. Once the final document is uploaded, a fresh workflow activity is created for the underwriter, who must add the financial worksheet in order to satisfy the requirements. The agent then receives a notification to review and approve the loan, after which, once the loan has been approved and signed, the closing documents are added and the workflow case is completed and archived. In many cases such as this, the individuals involved throughout the process aren't in the same building, let alone the same city or state.
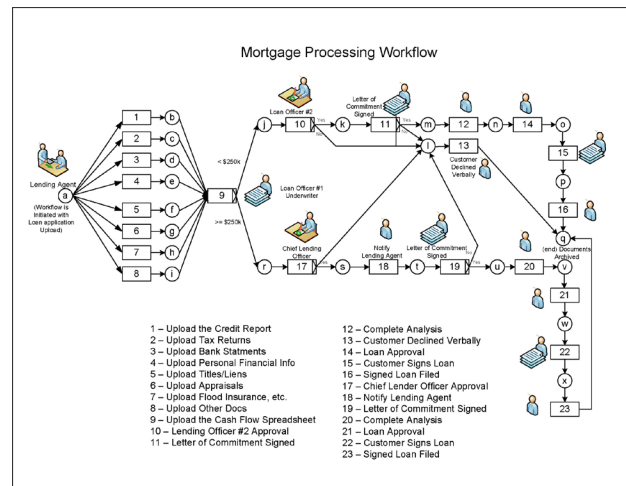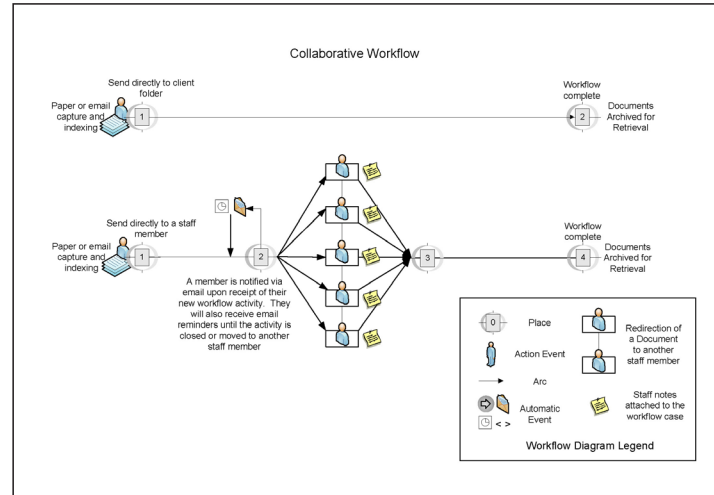

Overview of a business process workflow

With a collaborative workflow, projects can be assigned by a supervisor or on a rotating basis, or they can be given to the person in the department who has the least number of projects currently on-going (see diagram on page 8).

Retention is an important part of document management. WebSearch lets administrators establish policies for record groups and series; the system automatically applies these policies when a new file is created. A certificate of disposition is generated once the retention period has been achieved, presenting users with the option to shred, delete or archive the document.

Collaborative Workflow

Overview of a collaborative process workflow

WebSearch allows administrators to generate a number of different types of reports. The activity log variety tracks all actions: when a file was first entered into the system, opened or printed by users, shared with others and so on. Also of note are retention reports, which allow administrators to see when specific files were shredded, disposed of or archived. Both the activity logs and retention reports help comply with regulations such as Sarbanes-Oxley and HIPAA, among others. And because Archive Studio stores document metadata, it has some features needed for e-Discovery. Additionally, Archive Studio is Department of Defense-compliant. A workflow report for activities not yet completed is available; as is one that details the status of each project.

New Features in Archive Studio Professional Edition 4.2.22

Goby Capture

- Zonal text recognition, custom barcode reading and automatic document break recognition
- Advanced fault tolerance; problem image isolation with auto-notification of issues via e-mail
- Automatic polling of databases for auto-indexing of documents

WebSearch

- Capture and storage of e-mails from Microsoft Exchange
- Workflow engine helps automate the business process electronically

Value   ★★★★★

Archive Studio Professional Edition retails for $20,995 and supports an unlimited number of users and devices. It comes with 50 WebSearch logins, though it's important to note that multiple users can access the repository through one login. If an organization requires more, it can purchase a 10-pack for $3,000; discount thresholds based on volume apply. DocuLex provides free embedded applications for Ricoh-family and Sharp devices that are open architecture-enabled, available by request. So save for the extra bundles of WebSearch logins, everything is included. BLI likes the solution's straightforward pricing structure, especially considering businesses receive the capture component and archive in one, all-encompassing package.

Note that the company offers Small Office and Enterprise Editions, at $10,495 and $41,995, respectively. Both also support an unlimited number of users and devices; Small Office Edition restricts organizations to the included 10 WebSearch logins, while Enterprise Edition allows for an unlimited number.

Ease of Administration   ★★★★★

While resellers and even administrators within an organization can install Archive Studio, DocuLex reports that it does so 80 percent of the time; a majority of these are handled remotely and take one day or less. A SQL Express database is included, but if SQL Server is needed the organization must purchase it separately.

Goby Capture

Goby Capture is installed on the server. If an organization intends to have its employees fill out the Goby Profiler and print the barcode cover sheet, which is subsequently placed on top of documents to be scanned, administrators must create a thread—a set of rules for how a document is scanned, what back-end features are applied and the format in which the file will be saved into WebSearch. Businesses can create multiple threads and, using permissions, assign the right ones to specified users.

Creating a thread is simple. There are various types: processing documents with profile or mark forms, or barcodes; files from MS-Office; and to interface at an MFP control panel. A wizard then appears, where an administrator can select processing options such as auto-rotation, deskew, removal of blank pages and so on. Choosing the output format is the final step; selections include OCR text, XML files with metadata, FTP, e-mail, a device or simply output the files and metadata directly to WebSearch.
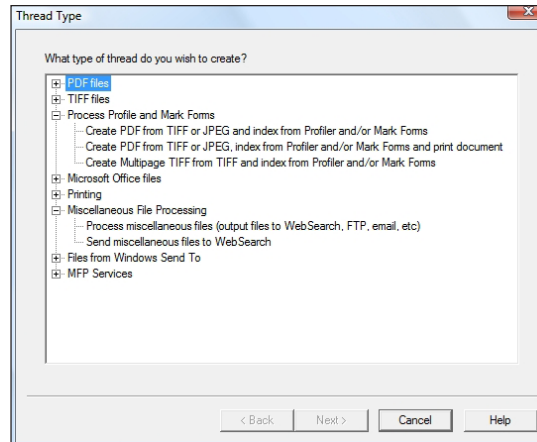
Administrators can create a thread so the
system knows how a document should be scanned.

If an organization chooses to bypass creating threads, documents will enter Web-
Search into a default folder, whereupon metadata can be added using WebSearch
and the document will then be routed to the correct library.

WebSearch

Administrators must first go to the WebSearch Administration Console to set up the
organization name. They do so by filling out information such as the organization
and site names, the business' Web site and logo, the maximum number of users,
whether or not the user dashboard is to be enabled, and so on. Furthermore, the
page asks for the administrator's name, ID and password. For the most part, using
the WebSearch Administration Console is a one-time visit.

From there, administrators will spend most of their time on the Admin and Retention
tabs of the WebSearch interface. On the former, administrators can manage settings
such as customization of the interface and archive; manage users, aided by integra-
tion with Active Directory; set up communities, which is DocuLex's terminology for
"groups"; assign users to one or more communities; and create libraries, which is the
third tier of the repository. Furthermore, administrators can manage metadata, both
the fields in which information can be input and the ways users view it; fields can be
locked down so only certain values can be entered, for example, "John Doe" as "J.
Doe." Also noteworthy on the Admin tab is that administrators can create security
permissions for users and communities, as well as manage the different MIME types
utilized by the system.

To enter a new library, administrators click on the button at the top of the screen,
click the "add a library" and enter information such as the library name, path and file
naming rules.

The Retention tab is where administrators can define the duration for which docu-
ments are stored and when they should be deleted or archived. The Reports button

allows administrators to see files that were recently shredded and retention dates for future documents. Legal holds on documents are easily achieved, which prevents file destruction until the hold is lifted by counsel.

WebSearch also addresses organizational workflow. The manual process of moving documents through a business is oftentimes subject to bottlenecks and processing errors, with difficulty in recognizing a problem until the nature of the issue becomes mission critical. Automating this process electronically ensures that documents and decision-making events move as designed to meet the organization's expectations. Visual workflow inspection by supervision is always available—from anywhere at any time.

Ease of Use ★★★★★

Goby Capture

The Goby Profiler, which resides on as many desktops in an organization as need be, allows users to create a barcode cover page that represents job settings, including color or monochrome, simplex or duplex, orientation, resolution and file format, and so on, and indexing information such as document type, category, account number and location. Most users should only require one-time training to understand how to fill out the Goby Profiler.
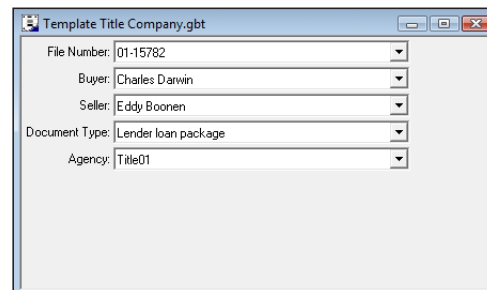
Goby Profiler lets users assign job settings
and indexing information prior to scanning a document.

Users print the page, put it on top of the document and then scan the job. The device being utilized sends the file to a hot folder; Goby Monitor goes into the folder, reads the barcode and instruction set, completes the file processing and delivers the document; output might be to WebSearch, an FTP site, e-mail address, imaging device, custom network folder or third-party ECM system.

DocuLex Goby Profile Form

File Number: 01-15782
Buyer: Charles Darwin
Seller: Eddy Boonen
Document Type: Lender loan package
Agency: Title01

Moncover 2 version   2.2

Once the Goby Profiler has been filled out, users print a barcode cover page and put it on top of the document to be scanned.

The cover page also acts as a separator so many documents may be scanned at once, without interruption. Another purpose is so the scan operator isn't required to know anything about the document or indexed metadata, which reduces human resource time at the device.

Once fully scanned, the document is available to be searched and viewed in Web-Search.

The fact that indexing happens before the document is scanned allows an organization to establish uniform naming conventions and the use of other key data directly from "the source," as described by DocuLex. The hands-off processing features work in the background so no interaction is necessary from users once a document is scanned.

Alternatively, organizations can choose not to enable the Goby Profiler and just have all documents scanned to WebSearch. In this case, the file would simply reside in a designated user's inbox, to be moved to the correct location later on. One example of this would be in a busy law office, where an attorney scans a document and then has a paralegal or administrative assistant add metadata to the file using WebSearch so it can be routed to the proper place, categorized with the appropriate document retention and cataloged with searchable metadata values.

WebSearch

The WebSearch interface has a clean design, and users should have no trouble learning how to navigate the system. The main screen allows users to search, while the other controls at the top of the page include those for View, Tools, Admin, Help and Log Off. A status bar directly below the main controls and the panes below identifies the logged-in users and displays any status messages after operations are performed. Layout selections can also be made from the status bar. As with other parts of Archive Studio, users should quickly become familiar with the interface.

The screen is set up in traditional format: a search pane on the left, with the rest divided between the results and document panes. The solution provides a variety of ways in which users can locate documents in the repository. The first search box allows for keywords to be entered; it can be combined with other search methods. The Matching Fields selection allows a metadata field to be added to the search via a drop-down menu. The system also includes several advanced search options: fuzzy, which will find a word even if it's misspelled; stemming, which lets users type a word such as "copy" and the system would also find "copying"; phonic, which will look for a word that sounds like the word the user is looking for; and natural language, which enables a search with any sequence of text. The Documents to Retrieve drop-down allows users to put a limit on how many documents are brought up in a search, while the Sort drop-down lets users customize the display of the search in the results pane. Finally, users must select the library they wish to search; administrators can specify which users can access which libraries, thus controlling what individuals can see and, ultimately, touch.
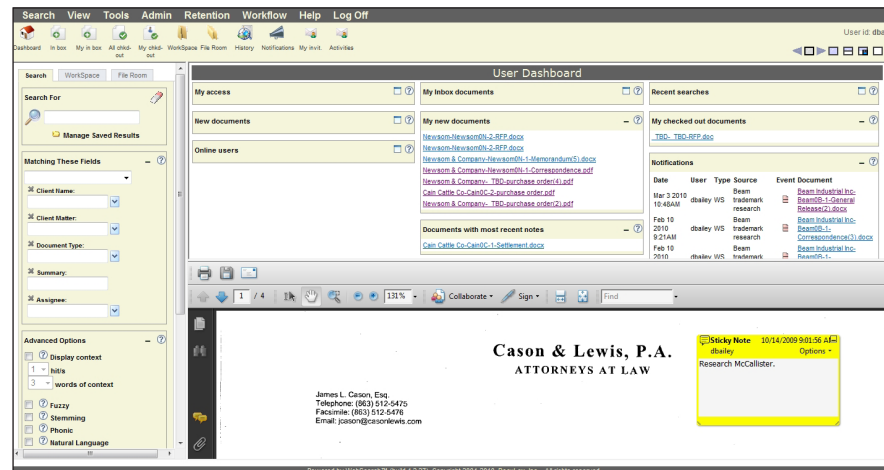
WebSearch—Main Screen with Dashboard

Once a search is complete, users simply check select boxes to the left of the file names to view or e-mail them. Furthermore, selected documents can be exported in CSV format, zipped, or copied to a workspace. It's here, too, where users can add, change or delete metadata information, simply by entering new values in the pop-up dialog box. If, for example, a document is stored in the default folder, once users add

metadata to the file it will automatically be routed to the proper library. The same applies to a document that has wrong metadata; once corrected, it will be moved instantaneously.
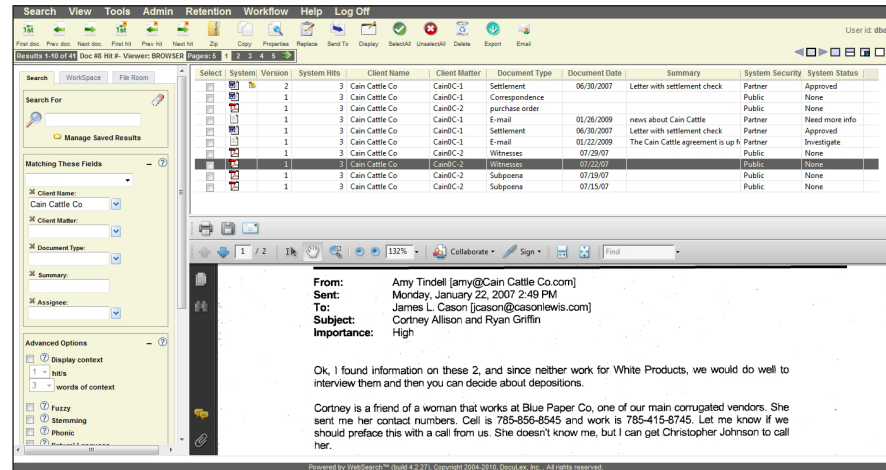
Users can see all files that are brought up after completing a search, in the results pane.

When the interface is opened, the user dashboard where search results are displayed will appear. Users can select the buttons to view their access permissions, recently uploaded files, documents that have had notes attached to them, recent searches, saved searches and notifications, among others. The dashboard isn't enabled by default, but BLI found it to be helpful so organizations should strongly consider making it available to their employees.

Saving electronic files from applications such as Microsoft Office is easy too. When the solution is configured with an application, users just have to click the button on the navigation bar at the top and the document will be automatically routed to WebSearch. With DocuLex's developer API, organizations can create the same button for virtually any application from which they need to save documents. WebSearch also acts as the perfect document repository for MS-Office files. For example, a bank executive needs to review workflow activity while waiting for a plane at the airport. Time is limited, and she must modify a financial spreadsheet. The executive checks out the file, which becomes viewable but not capable of being edited by another person. WebSearch passes a copy of the file to a Web-Search component—the "Work Folder" on the executive's laptop, whereupon she can open the file during the flight or later on to make edits without being online. The local work folder will keep track of the checked out file until the user has completed the work. And once she indicates to the work folder that the job is done, the file will automatically upload and check the file into WebSearch as a new version or replacement to the file that was checked out. At that time, the checked out file will be unlocked for other users.

Compatibility ★★★★★

Goby Capture is compatible with MFPs, desktop and network scanners, and fax machines that can output JPEG or TIFF files. The scan piece can run as an embedded application on Ricoh-family and Sharp devices that are open architecture-enabled. It also supports all types of network, desktop and wide-format scanners that use USB, SCSI or network TWAIN. Connectors for third-party on-ramps such as EFI SendMe, Nuance eCopy ShareScan, and DigiDocFlow, all of which provide MFP control panel access to Goby Capture, are also available.

The platform requires a server running Windows XP, Vista, 7, Server 2003 or Server 2008 and an NTFS file system. At the desktop, users can access WebSearch via Windows XP, Vista or 7, as well as Mac, operating systems running Internet Explorer or Firefox. The solution can't run on other server systems such as Linux and UNIX, though this shouldn't be an issue because a majority of SMBs—the target market for Professional Edition—don't use either. WebSearch also supports terminal server and VMware.

Software Integration ★★★★☆

The solution integrates with Microsoft Active Directory, Office, Exchange and SQL Express, and is packaged with a developer API so files can be saved into the repository from virtually any line-of-business application. DocuLex also provides an agent that runs on PCs, enabling copy-and-paste—screen scrape—integration between the line-of-business application and WebSearch, while an ODBC connector allows the capture and archive components to pull existing indexed metadata from an application. In addition, a third-party connector to various pieces of Sage software is available for a nominal cost. However, unlike some platforms, Goby Capture can't scan directly to SharePoint or Lotus Notes.

Security ★★★★⯪

The system supports three types of authentication: classic, meaning users must log in to WebSearch by entering an ID and password; Active Directory, so when users log in on their PCs they're able to access the archive without having to authenticate themselves again; and x.509v2 digital certificate, which allows users to configure

WebSearch to accept browser-configured digital certificates from a specific author-ity. Discretionary access control lets users set up permissions for files they own, while mandatory access control puts the power on the system to automatically enforce policies based on document and user security levels. According to Docu-Lex, most document management solutions provide only for the latter, but Archive Studio does both concurrently.

Within WebSearch's internal database, an audit trail of each and every critical action taken by users is recorded, which can be queried and purged by administrators; with this feature, organizations can know with 100 percent accuracy the history of who's retrieved and deleted files, for example, in the system. Alerts when specific files are changed or deleted can be configured by administrators, and the system allows for digital date and time stamping. Finally, Archive Studio employs 256-bit internal encryption when documents are initially entered into WebSearch, which also supports management of and access to encrypted PDF files, as well as the use of encrypted network folders. However, unlike some systems, the capture platform doesn't support the creation of encrypted PDF files directly; rather, it relies on third-party applications such as Adobe Acrobat.

Product Support and Training

All support for resellers and customers is provided by DocuLex. The company's call center is open from 8 am to 8 pm Eastern Time, Monday to Friday. BLI called the sup-port number at several different times of the day over a week, obtaining a representa-tive in less than 30 seconds each time; rather than having to navigate an automated system, users can punch in extension 525 or be patched through by the operator. For after-hours support, organizations can send an e-mail to support@DocuLex.com and are assured that the issue will be resolved within a day, provided it's of the basic or intermediate variety; matters that require more research take a couple of days on average, according to the company. With the permission of businesses, DocuLex can access systems remotely to troubleshoot and rectify problems. With active sup-port, the company's staff generally performs any patches or upgrades to the system while online with the customers installation of Archive Studio.

The company offers free Webinars—described as "training workshops"—for resell-ers and customers twice a month; these cover installation to setting up scan threads to managing the archive to running reports, and everything in between. DocuLex also provides online help and FAQ pages for further support and training, and a fee-based onsite training option is available at a rate of $1,000 per day, plus expenses.

Dealer Support and Training ★★★★★

Dealers, direct sales and resellers must pass DocuLex's qualification test in order to be licensed to sell the solution. Additionally, the company encourages resellers to have a not-for-resale version of Archive Studio in their showrooms. Once every six weeks, the company holds a free three-day training seminar at its headquarters in Winter Haven, FL, which covers what Archive Studio is designed for, the key and new features, and so on, while resellers.DocuLex.com provides additional information not found on the company's standard site. Dealers and direct sales offices with a dedicated solutions specialist or large technical support department can tackle issues that reside in Tier 1 and 2, while DocuLex handles problems in Tier 3 by itself. Finally, if the reseller handles installation the representative typically delivers a full-fledged training session to a core group of one to four individuals, or sometimes more depending on the size of the business; these people are then responsible for any broader training within the organization.

Customer Support and Training ★★★★★

Organizations must purchase a maintenance agreement, which allows for unlimited telephone and e-mail support, as well as providing free software upgrades and patches. Customer training is typically performed by DocuLex, and organizations have the same options—Webinars, online resources, onsite visits—as resellers, save for the seminars at the company's headquarters.

Documentation ★★★★★

Provided in searchable PDF format, documentation is divided into several comprehensive guides for administrators and users. The manuals are well-written, present information in a logical order, include screenshots and diagrams, and assume no prior knowledge of the system. In short, users who have trouble with any aspect of Archive Studio should be able to quickly obtain the answer to their problem. Furthermore, DocuLex offers help and FAQ pages on its Web site.

Global Business Readiness ★★★☆☆

Archive Studio is sold in North America, Latin America and the Caribbean by the Ricoh-family and Sharp channels, as well as VARs and some independent equipment dealers of those MFP manufacturers that DocuLex hasn't yet partnered with. Though sales outside the aforementioned regions aren't being actively pursued at the present time, the company states that the solution has been deployed in many organizations throughout Europe and Asia. DocuLex, which is headquartered in Winter Haven, FL, and has satellite offices around the United States, will also sell directly in territories where it either has a small presence or none at all. Documentation is available in English and Spanish. And while Archive Studio has been localized in the latter language, the company claims that it can provide a version in, for example, French, Italian or German within two weeks, should the need arise.

Upgrade Path ★★★★★

Organizations are required to purchase an annual maintenance agreement, which costs 20 percent of the total price of the solution. The contract covers unlimited phone and e-mail support; access to "dot" releases, which DocuLex puts out three or four times per year; and free major-version upgrades, which can be installed right on top of the predecessor and are generally offered twice a year.

Goby Capture supports an unlimited number of users and devices, while the system includes 50 non-concurrent logins for WebSearch; multiple users can access the archive through one login though. Organizations can buy 10-packs of logins, which retail for $3,000 each (discount thresholds are available). The only thing that really needs to be added to Archive Studio is embedded applications for use on Ricoh-family and Sharp devices that are open architecture-enabled; these are free and available by request.

Superior Office Systems Finds Early Success Selling Archive Studio

Superior Office Systems (SOS), an exclusive Canon dealer located in New York City, added DocuLex Archive Studio to its line of offerings in Fall 2009. Chris Wilkie, sales manager for SOS, is elated about the results and predicts even greater success.

The core of SOS' customer portfolio is small and medium-size businesses, some of which are in the accounting, education and non-profit sectors. When Wilkie felt the need to offer a more feature-rich document management solution to SOS' clients, he investigated a host of solutions. Archive Studio Professional Edition quickly differentiated itself from the competition. "Not only does it carry a phenomenal price, everything's included," Wilkie said. "The scan piece, the archive—all we need to know is how many users you have. The 'standard versus optional' discussion is out the window."

The sales cycle unfolds in three stages. First, SOS presents the solution to prospective clients. Wilkie estimates that half of those opportunities move to the proposal stage. Once interest has been piqued, SOS then brings a DocuLex representative on board to give a Webinar to the client. From there the pendulum swings back to SOS, which draws up terms of the deal and closes the transaction. DocuLex then handles the installation and ongoing support. "Our relationship with DocuLex couldn't be better," Wilkie said. "It puts us in the position to be successful over the long haul."

When engaging with prospects, Wilkie's staff tries to discover how an organization's workflows operate and where the "pain points" are. "Businesses are usually buried in some sort of paperwork," he commented. "How do files flow through an organization? What do you do with them, from the time they're created until they're shredded? We're a total solution provider, hardware and software, and Archive Studio helps us be that."

Wilkie estimates that 80 percent of the prospects his reps present Archive Studio to are fresh business contacts, meaning adding the solution has opened SOS up to a growing audience of potential clients. As is typical with document management placements, in one recent case SOS deployed Archive Studio for a single department as a form of beta testing, then rolled it out to other departments after everybody was comfortable. "It gets a better reception this way," Wilkie said. "You're educating incrementally within your business, and that seems to be the most desirable method."

One of the features he touted as being important to organizations was Archive Studio's non-proprietary architecture. "It gives SOS and our customers the flexibility to change as technology improves," he said. "We have no concerns that our customers will incur any additional charges for upgrading or changing their software."

Compared with the document management systems SOS has sold in the past, Wilkie described how Archive Studio enables the company to achieve an important yet, perhaps, more subtle goal. "Selling a third-party developer's software always helps a solution provider like us be better on our feet, more nimble," he stated. "We could sell others but couldn't recommend them over Archive Studio. The features you get for the price you pay—it's excellent."

DocuLex Helps Law Firm Archive 14,000+ Boxes of Hardcopy Documents

Boxes upon boxes upon boxes of old case files, over 14,000. That's what Atlanta-based law firm Parker, Hudson, Rainer & Dobbs (PHR&D) had amassed, dating to the mid-1980's. The number is practically inconceivable, but the storage fees—astronomical, in excess of $200,000 per year.

When the partners met in the first quarter of 2008 to figure out how to streamline operations and cut costs, ridding the firm of this burden was near the top of the list. Enter Benita Dansby, IT manager of PHR&D, who was tasked with solving the problem. "A major challenge, yes, but even more so it was a serious *undertaking*," she said. "We had to find an economical way to organize the documents that must be retained. Aside from the off-site storage location, which is where the bulk of the boxes were, entire rooms in our office were filled with old files. Valuable time was being wasted hunting for folders, a lot of money was being spent and productivity wasn't where it needed to be: the time had come for us to convert this paper into a digital form that could be easily stored, searched and retrieved."

Dansby looked at several competitive document management solutions but ultimately decided on DocuLex Archive Studio Professional Edition. For her, it came down to three things. "First off, the customization of the barcode cover sheets, which are placed on top of documents to be scanned, is far superior to that of any other offering," she commented. "Another developer tried to give us the flexibility we require, but in the end only DocuLex was able fit the bill. Archive Studio has more profile fields, more options and excellent organization of metadata, and it's all because of these cover sheets."

An easy to use system was also crucial. "It didn't take long to train our staff how to complete the cover sheets, and once documents are scanned Archive Studio practically runs itself," Dansby said. "Sure, the buy-in among our administrative staff, who are responsible for the physical scanning of documents, was a bit longer than with others, but there's very little managing to be done other than searching, retrieving and sharing files when they're stored in WebSearch. In fact, when we first started out it was almost exclusively our staff who were using the archive, but now it's about a 60/40 split between them and the attorneys—they've found it easy to navigate, once they realized the power they held, right at their fingertips."

And the third factor? "Simple: price," Dansby declared. "The feature set you get for the price you pay is virtually unbeatable. We've still got plenty of boxes in storage, but the net-net of our situation is that we believe the system paid for itself within 60 days."

Dansby noted that, now that the firm has experience with the solution, three other items have played a vital role. "We were looking for a system that has excellent OCR capability, and Archive Studio has more than met our needs. We also needed a system that we could expand as the need arose, and we have taken advantage of this function by moving documents to a network storage device. We now have over a million pages scanned and hope to double that amount this year. Also, DocuLex's support is top-notch. We haven't had to use it a lot recently, but at the beginning,

when I was customizing scan threads and the cover sheets, they were exceedingly helpful and efficient. Their technical support crew can remotely access our system to troubleshoot problems, and this too has worked very well."

It's been 18 months since PHR&D implemented Archive Studio. At first, only one scanner was utilized, a Fujitsu, but Dansby added a Canon to the mix at the end of last year to help bear the load. "Plus, we recently refreshed out fleet and now have six Ricoh MFPs, which we're hoping to add to the DocuLex prgram soon," she said. "These will further assist our efforts because we'll embed them with the solution's on-board application, which DocuLex provides for free."

The end result has been nothing short of an outright success, according to Dansby. "We're making excellent progress through the process of converting all these hard-copy documents into electronic form," she stated. "And once we're even closer to being done, we'll start to move open cases, which have since been closed, from our other document management system to Archive Studio. It makes sense for us to have two separate databases, and I don't foresee a time when we'll only have one, but DocuLex provides a superb solution—and our firm is tremendously impressed by it."