DocuBrain® TechDoc

A Smarter Way to Manage Documents

A SECURE, ROBUST DOCUMENT AND RECORDS MANAGEMENT SYSTEM

KEY FEATURES

- Manages documents through their full lifecycle
- Supports any type of file as a document
- Manages records for resident and nonresident documents
- Manages forms and their submissions
- Automates business processes using integrated workflow engine
- Distributes searching for different audiences

KEY BENEFITS

- Secure Management and Distribution of Documents
- Reduced Distribution, Deployment, and Training Costs
- Improved Efficiency
- Significantly reduced chance of paper cuts

DocuBrain TechDoc: Document and Records Management

DocuBrain encompasses a family of software products designed by Prevo Technologies, Inc. to help you manage electronic documents, records, forms, images, and more. Our flag ship product called TechDoc provides an easy way to manage documents of any type while being web-based, ISO 9000 compliant, FIPS 140-2 compliant, NPR 2810.1 compliant, standards based (HTML, HTTP, HTTPS, XML, Java, JavaScript), security customizable to the document level, inexpensive even with thousands of creators and tens of thousands of readers, and portable across hardware, operating systems, databases, and browsers.

Document Management

Document maintainers use a web browser to connect to the desired Document Manager where they perform operations on their documents (Create, Reserve/Replace, Release). The Document Manager has a Windows Explorer like interface with cabinets, folders, and documents to allow for the hierarchical organization of their documents.

Documents can be organized in cabinets by project, organization, document types, etc. The Document Manager provides the capability for users to create subfolders to better organize the documents within their work area.

Document maintainers create and modify documents using the tools that they are already familiar with (Office, Acrobat, AutoCAD, etc.) The Document Manager has the capability to store any electronic file type, such as audio, images, video, not just traditional documents (Word, Excel, PowerPoint, PDF, AutoCAD, etc.)

The Document Manager has a review process that can be used for single or multi-level reviews in serial, parallel, or a combination of the two. It supports threaded discussions with optional attachments, voting, and approval. The system can optionally produce a watermarked PDF version of the approved document. Many files types are supported for the automated rendering to PDF.
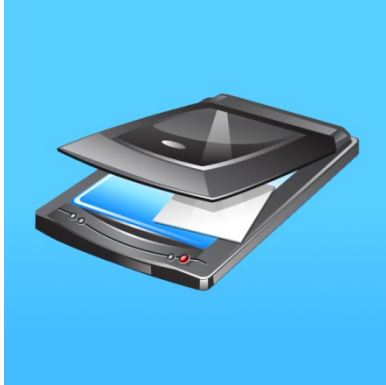
MANY WAYS TO INTERACT WITH TECHDOC

KEY WAYS TO INTERACT

- A web browser, obviously
- A scan agent that can import images and files using Kofax Capture and other scanning solutions, or simply by watching folders
- A drag and drop client that can quickly automate the import/export of thousands of documents
- A workflow editor can upload and maintain deployments to be executed by the workflow engine
- A SOAP API so that you can import documents on your terms with your software
- Acts as an IMAP server so desktop and mobile users can save emails to TechDoc using their email apps such as Outlook, Apple Mail, Thunderbird
- Features and Web Parts to interact with SharePoint

TechDoc utilizes a BPMN 2.0 compliant workflow engine to automate business processes. Processes can be started manually or automatically by events such as creating, modifying, and deleting documents. TechDoc-specific activities allow business processes to interact with the Document Manager.

History tracking is recorded for all actions that have been performed by a user on a specific folder, document etc. TechDoc also has a Reports feature to allow Admins and Users to create ad hoc reports and save them as CSV, HTML, or XML files.

Records Management

The Document Manager also supports Records Management features. Records can be create for resident documents stored within the Document Manager and nonresident documents that may be stored within another repository or that may be physical assets.

TechDoc supports normal manual record and record set creation where the user has full manual control of creating and maintaining records. TechDoc also supports automatic record and record set creation based on specified criteria. For example, business agreements between a Government agency and other organizations should always have a record associated with them. By simply creating a Business Agreements document type and associating a File Plan with a retention schedule to it, records are automatically created anytime a business agreement is placed in the system.

TechDoc supports vital records, permanent record, and frozen records. The Document Manager is fully aware of Records Management features. If a record is frozen and it is associated to a resident document, the Document Manager will not allow the document to be deleted or modified until that record has been unfrozen.

Forms Management

TechDoc supports creating electronic forms, collecting submissions on those forms, printing and exporting of the submissions to various formats including CSV, HTML, PDF, and XML. All form submission fields are full text searchable, permit content validation, and allow security to control who can modify the field.

Search Manager

While the Document Manager supports searching within itself, TechDoc also supports a separate search engine that allows Document Readers to access the centralized search manager, to locate and fetch their documents. The Search manager is specifically designed for end-users that only need to locate and read documents.

Much like using Google ® or Bing ®, the end-users is able to retrieve documents without having to know where the documents are actually located. TechDoc's search engine capability allows for multiple Document Managers to be indexed; thus capturing a broader set of document/corporate knowledge and making it easily available to the user community. To keep the search manager(s) up to date, whenever a document is created, modified, released, or deleted, an update is automatically sent to the appropriate search manager(s).

The Search Manager supports metadata and full text searching. It supports wildcards, phrases, etc. Search results can be output in XML format for easy consumption by other applications.

A Document Manager can populate multiple Search Managers to support various security and distribution requirements. For example, a Document Manager could contain company private documents as well as documents that it wants to make available to the general public. In this scenario, a campus Search Manager could be configured that would contain information about most documents in the Document Manager and a global Search Manager (GSM) could be configured that would only contain information about public documents in the Document Manager. The GSM could be configured to run in cached mode so that the metadata and a copy of the latest released version of each public document would be pushed to the GSM. Because the GSM has all the information it needs to serve the public and nothing more, it can be safely placed outside the company firewall without compromising any of the company's private documents.

Improved efficiency

TechDoc doubles as an excellent document distribution system, thereby reducing paper, reducing mistakes made from out-of-date printed documents, etc. Documents are always available. There is no need to get to the library during business hours or to contact the document owner in order to get a copy of the document. This is particularly important across time zones.

KEY SEARCH BENEFITS

- Centralized search allows end-users to go to one search engine to find documents regardless of where they are managed
- Very simple to use but also includes wildcards and targeted metadata searching for more advanced users
- Live updating of search engines allows end-users to see changes to documents within seconds
- Multiple search engines can be configured to host different sets of documents and can even be placed behind different firewalls for added security
- Optional cached mode allows copies of some documents to be available on a search manager while more sensitive documents remain safe behind your firewall

DOCUBRAIN COMMUNITY

Our community is a place where you can ask for help, share tips and tricks, and stay up to date on the latest news! Here's some of our community links:

- docubrain.com/community
  Community landing page

- docubrain.com/blogs
  Staff blogs

- docubrain.com/forums
  Support forums

- docubrain.com/news
  DocuBrain new articles

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Scan for more
information about
DocuBrain®

Reduced distribution costs

Many documents used to be produced in hardcopy and distributed to large numbers of people. With TechDoc, only those requiring a copy of the document need fetch it electronically; many end up using it electronically and never need to print it.

With TechDoc's ability to send electronic notification and distribution emails, there is no longer a need to send physical memos when a document is created, revised, released, or deleted. The electronic notification even contains a link to fetch the document.

Reduced deployment costs

There's no additional client installation or maintenance costs because TechDoc runs through the user's current web browser. There are no per-client costs because a free web browser and free PDF viewer are available for almost every type of client platform. Since the document maintainers keep using the same authoring tools, they don't need any special software installed either.

Reduced training costs

Due to its simple interface and comprehensive, on-line help system, users can become and stay productive with little or no training. Unlike many products on the market, we try to minimize the impact to users between versions.

Want to know more

Hopefully, we've got you interested to learn more. Feel free to contact us via one of the methods on the left or follow us on social media.