

Functionality	Products	TechDoc	Application Notes
			✓ Current ⌘ Scheduled Future Release
General			
Web based		✓	Works on all major browsers
Standards based		✓	HTML, HTTP, XML, SQL, Java, JavaScript
Manages documents through their entire life cycle		✓	
Provides extensive document security and access controls		✓	
Provides full history tracking		✓	
Provides electronic notification of document events		✓	
Provides ad-hoc reporting capabilities		✓	
Provides revision control of approved documents		✓	
Distributes latest released documents to user community		✓	
Provides full text search/retrieval of released documents		✓	
Provides for on-line review and approval of documents		✓	
Provides separate management and discovery components		✓	Document Manager and Search Manager
Cloud and Virtualization			
Can be deployed to the cloud on a Microsoft Azure Server		✓	
Can be deployed to a Microsoft Hyper-V Virtual Machine		✓	
Can be deployed to a VMware Virtual Machine		✓	
Can use an Azure SQL Database for SQL storage		✓	
Document Manager			
Designed specifically for document creators/maintainers		✓	
Creators only need a browser and normal authoring tools		✓	
Manages any type of document		✓	Text, Spreadsheet, CAD, Audio, Video, etc.
Manages non-resident documents		✓	Physical objects or items in another repository
Documents organized by cabinets and folders		✓	Organize by project, business unit, etc.
Documents can be organized by search folders		✓	Organize by various document attributes
Released generations designate approved versions		✓	
User-defined keywords can be added to documents		✓	String, Date, Number, URL, dropdown
Reserve/Replace Collaboration		✓	Check in/Check out
Doc Categories apply immutable restrictions on documents		✓	EAR, ITAR, Proprietary, Trade Secret, etc.
Doc Types organize documents by business use		✓	Applies special processing by type
Multiple file areas		✓	Allows storage across multiple drives
Extensive URL Support		✓	Fetch Latest/Specific Release, Generation, etc.
Can push documents to zero or more Search Managers		✓	No search, single SM, hierarchy, star, etc.
Automatic conversion of many formats to PDF		✓	Depends on license level
Documents and generations can have attachments		✓	
Projects to associate groups of documents		✓	Can also track information about the projects
Electronic Forms			
Web based electronic forms		✓	
Built using web standards like XML, HTML, and CSS		✓	
Forms fully integrate with Document Manager		✓	

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		✓ Current ✘ Scheduled Future Release
Form submissions are full text searchable	✓	
Forms can be exported to CSV, HTML, PDF, and XML	✓	
Form field data types	✓	Text, currency, date, time, combo box, etc.
Form field validation	✓	Regex, range, min length, max length, etc.
Form field editing security	✓	Read-only, owner, anyone, Office Use 1, etc.
Email Client Integration		
TechDoc provides IMAP/IMAPS protocol support	✓	
Supports all major email clients	✓	
Client can simply copy emails to/from TechDoc mailbox	✓	
Folders can be created in the TechDoc mailbox	✓	For better organization
Special Records folder is available in the TechDoc mailbox	✓	Much like Inbox and Outbox are always there
When email placed in Records, a record is also created	✓	
Email records are treated like any other TechDoc record	✓	May be vital, permanent, frozen, etc.
Folders created under Records also auto-create records	✓	
Metrics		
Supports business metrics	✓	Key Performance Indicators
Any document can be designated as a metric	✓	
Released generations are assigned a metric status	✓	Green Steady, Green Trending up, etc.
Metrics can have different frequencies	✓	Monthly, Quarterly, Semi-Annually, etc.
Alerts can be sent when metrics are late	✓	
Metrics Dashboard provides management level view	✓	
Records Management		
Manages records on resident documents	✓	
Manages records on non-resident documents	✓	
Supports automatic record creation	✓	By Doc Type, location
Supports manual record and record set creation	✓	
Supports vital records	✓	
Supports permanent records	✓	
Supports frozen records	✓	Documents tied to them can't be modified, etc.
User-defined keywords can be added to records	✓	
User-defined keywords can be added to record sets	✓	
Records Management specific reports	✓	
Remote API Integration		
IMAP/IMAPS protocol support	✓	
REST protocol support	✓	
SMTP protocol support	✓	Documents created based on email address
SOAP protocol support	✓	
Reports		
Ad-hoc reports can be defined	✓	
User-selectable display columns	✓	
User-selectable sort columns	✓	
User-selectable criteria	✓	
Output to multiple formats	✓	HTML, CSV, XML
Supports CSS styling for HTML reports	✓	
Users can only report on items they have read access to	✓	

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Security		
Supports FIPS 140	✓	
Supports NASA NPR 2810.1	✓	
Supports encryption of transmitted data	✓	
Supports encryption of data at rest on server	✓	
Supports internal firewall	✓	Always use multiple layers of security
Supports multiple authentication mechanisms	✓	Local, SAML, ADFS, LDAP, RADIUS, SecurID, etc.
Plug-in interface to easily add authentication mechanisms	✓	
Password strength settings for local authentication	✓	Length, types of characters, etc.
Password reuse settings for local authentication	✓	
Forgot Password mechanism	✓	Can be disabled by an Admin
Username reuse settings for local authentication	✓	
History, Logging, and Email Alerts of access	✓	
Permissions to limit actions that users can perform	✓	
Access controls to limit items users can perform actions on	✓	By individual users and/or groups of users
System Groups maintained for employers & organizations	✓	Users automatically added and removed
Scan Agent		
Provides ability to create documents from scanners	✓	
Specific imaging/scanning hardware not required	✓	Allows use of current scanners
Provides mapping of scanner to TechDoc metadata	✓	
Supports scanning from multiple sources	✓	
Supports different priorities for each source	✓	
Built-in support for scanning solutions	✓	Kofax Capture, Adobe Capture
Also supports folder watching for simple solutions	✓	
Search Manager		
Designed specifically for end-users	✓	
Provides searching by full text	✓	
Provides searching by document metadata	✓	
Provides searching with wildcards	✓	Including leading wildcards
Supports thumbnails for many formats	✓	Office, PDF, Images, etc.
Supports layouts to customize output	✓	Useful for outputting in different look and feel
Supports outputting to XML	✓	Allows easy consumption by other apps
Supports searching across multiple Document Managers	✓	End-users go one place to search
Supports caching of latest released documents	✓	SM can be outside firewall with DM's behind
Supports document pools with different access controls	✓	
Multiple file areas	✓	Allows storage across multiple drives
Multiple Search Managers can exist with different contents	✓	SM's can service different audiences/purposes
API allows non-TechDoc systems to be searchable	✓	
SharePoint Integration		
SharePoint Business Connectivity Services (BCS) support	✓	Manage TechDoc Content from SharePoint
Web Part allows documents to be shown in SharePoint	✓	Manage in TechDoc, display in SharePoint
TechDoc Client		
Desktop application for easy import/export of documents	✓	
Supports drag and drop creation of documents	✓	
Supports drag and drop export of documents	✓	
Supports profiles for repetitive imports	✓	

<div style="text-align: center;"> Products <hr/> Functionality </div>	<div style="text-align: center;"> TechDoc </div>	<div style="text-align: center;"> ✓ Current ☞ Scheduled Future Release Application Notes </div>
Supports search folders to group documents by criteria	✓	
Workflow		
Support for BPMN 2.0 workflow processes	✓	
Graphical BPMN 2.0 workflow process drawing tool	✓	
Document events can start a BPMN 2.0 workflow process	✓	
Supports TechDoc-specific Tasks in workflows	✓	Add Access, Add Keyword, Release Doc, etc.
Review process supports serial, parallel, or combination	✓	
Review process supports single or multiple levels	✓	
Review process supports auto or manual level promotion	✓	
Review process supports durations	✓	Different durations per level, per review
Review process is tied to a discussion board	✓	Allows capture of knowledge about the review
Informal review through Request for Comments process	✓	



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