

**kwiktag<sup>®</sup>** *for* eDOCS DM

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# **KwikTag for eDOCS DM Product Description**

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## **KwikTag Paper-Capture for eDOCS DM**

### **Overview: Matter Centric Support**

Matter Centric Document Management provides sizable benefits, but for maximum value, paper needs to be scanned and included in the repository.

KwikTag for eDOCS enables organizations that utilize eDOCS DM to employ KwikTag's patented tagging method to easily file paper into the DM Repository. It supports the productivity-enhancing profiling methods of the latest releases of DM.

### **Easy to Learn**

KwikTag for eDOCS makes capturing paper into the DM repository easier than ever. KwikTag lets users easily profile, tag and set documents aside so that they can continue with their work. Productivity is maximized and training is minimized because KwikTag operates within eDOCS and uses eDOCS profiling. Users do not need to learn or launch anything new.

### **KwikTag for eDOCS at the Client**

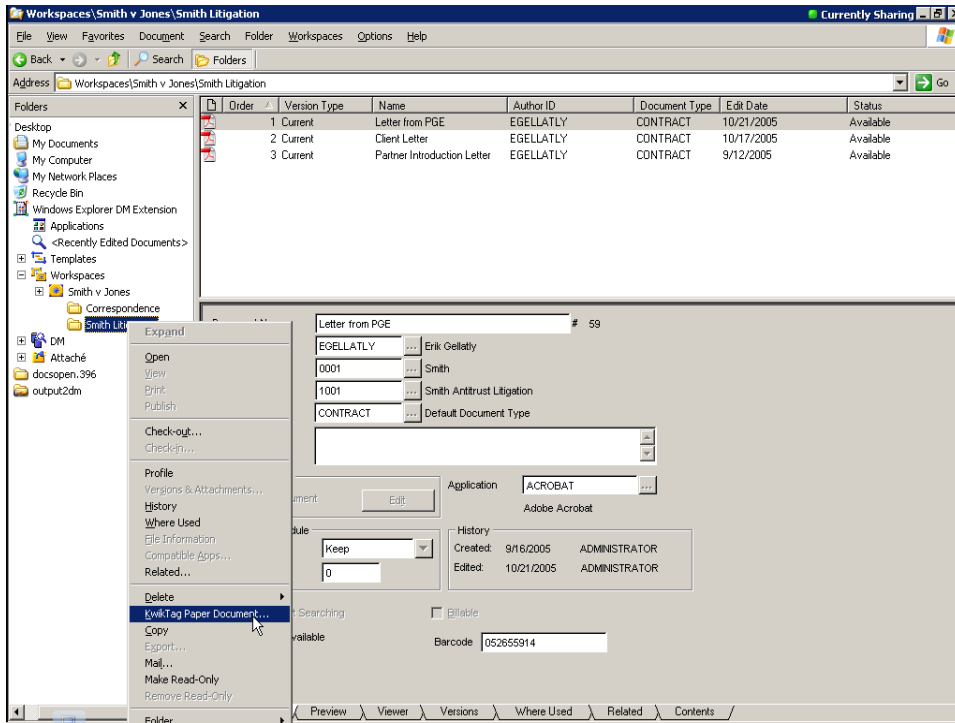
KwikTag for eDOCS embeds KwikTag's patented tagging method to take advantage of the matter-centric features of eDOCS DM. This creates separation in the scanning and profiling steps so that users can perform these functions at their convenience.

Specifically, users the ability to profile paper documents in a manner similar to other profiling activities.

### **Multiple, Seamless Ways to Capture Paper**

KwikTag for eDOCS gives users flexibility to profile documents in the way that is most convenient. Working hand-in-hand with eDOCS, KwikTag lets users profile and scan paper with the least possible effort.

By right-clicking on a folder, users can select a new option on the context menu of the folder titled "**KwikTag Paper Document**" (see Figure 1 below).



**Figure 1 - Example Menu Option – Profiling Paper by Right-Clicking on a Folder**

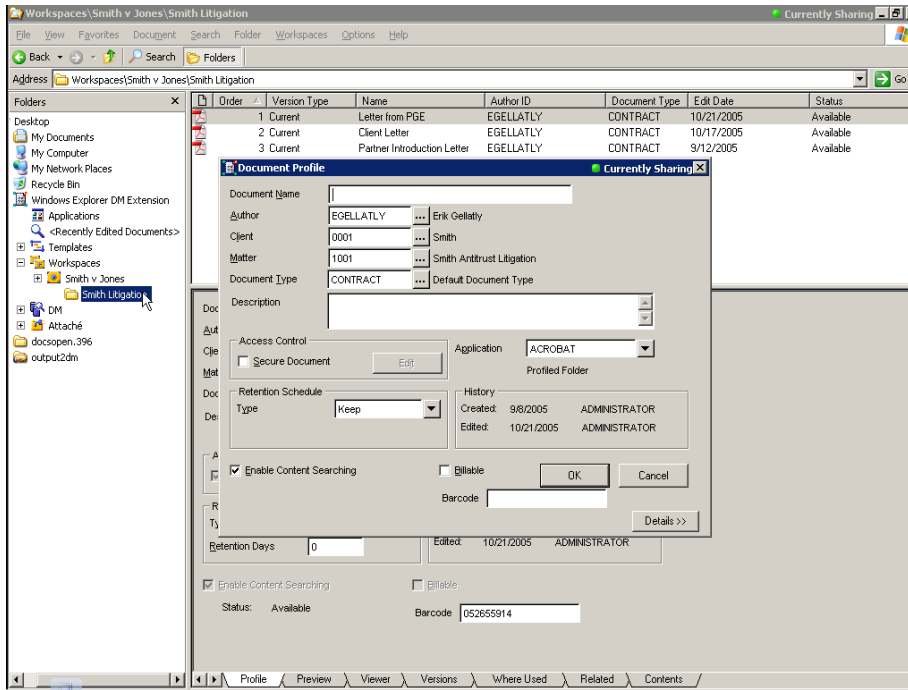
Selecting this option presents the standard profiling form used for the document library. True to the matter-centric nature of eDOCS DM, profile fields will be auto-populated. (See Figure 2 below).

By pressing “Control K” or selecting “KwikTag Paper Document” from the application menu, paper document profiling is also started. These options also present the standard eDOCS screens for profiling the document.

Besides standard document profiling steps already being done by users, KwikTag adds only a single additional step, illustrated below. Compared to profiling an electronic document, KwikTag lets users profile paper to be scanned with as little as a single, extra mouse click.

When a user starts the process using any of the above-described options, the following occurs:

1. The standard EDOCS profiling screen is displayed. If it has been called by right-clicking a folder, it is pre-filled. If not, the user fills in profiling information (See Figure 2 below).



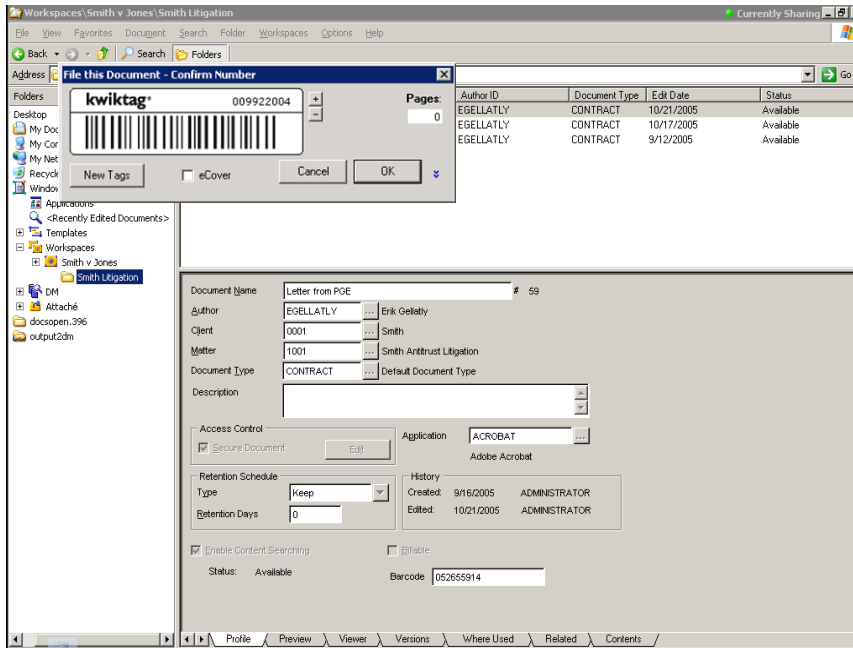
**Figure 2 – Pre-Filled Profile**

2. The paper is profiled like any other document. When profiling is completed, the KwikTag dialog (Figures 3 and 4, below) shows the user’s next barcode number in their dispenser



**Figure 3 - KwikTag Dialog**

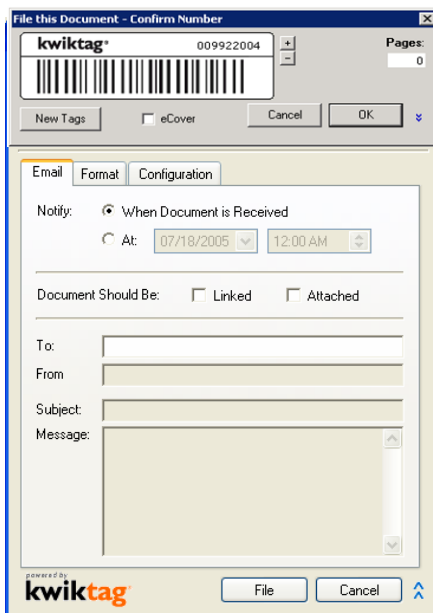
- a. The user confirms the number
  - b. The user clicks OK
  - c. Note that the user has the option to enter the page count. If the user fills this option, KwikTag will verify that the scanner has scanned all pages of the document – an important and automatic quality check.
3. Once the user presses “OK”
    - a. the profile information along with the barcode number is saved in eDOCS DM
    - b. A temporary PDF document is uploaded as a placeholder, which will be automatically replaced when the scanned document arrives



**Figure 4 – Completion of Profiling - KwikTag Dialog within EDOCS**

**KwikTag for eDOCS also gives users additional capabilities, such as:**

1. Send an email notification related to the document. For example, there may be several attorneys working on a matter, and all are copied when a new document arrives. KwikTag will let you replace the copy-and-distribute process with an automatic email notification and a link to the document.
2. Change the file type of the stored document, e.g. PDF, PDF Image+Text, TIFF, OCR-to-MSWord
3. Add or change image processing options, e.g. rotation, redaction of the tag.



**Figure 5 - KwikTag Dialog - Expanded View**

These options are available to the user via an expanded view of KwikTag. The user invokes these options by clicking on the chevrons in the lower right section of the dialog. The dialog “remembers” its last state, either standard or expanded. An example appears to the left.



### **KwikTag Does The Rest – KwikTag’s Paper Gateway®**

Once a user scans a document, KwikTag does all the work, finishing the process of getting the document into the eDOCS DM repository. The KwikTag Paper Gateway is a high performance image processing engine on a server that runs fully automated and performs the various tasks required to deliver and store documents into the appropriate repository.

KwikTag’s Paper Gateway monitors the output of the various scanning devices in your organization. When a batch of documents is scanned, KwikTag’s Paper Gateway uses the bar codes to separate the documents, insures that all documents are stored and displayed upright, and performs various other tasks that have been selected, such as OCR and converting to PDF Image +Text, email notifications, and so on.

Rigorous, automated quality control functions assure that documents are accurately captured and stored, monitoring to make sure all profiled documents get scanned, counting to assure the feeder has pulled and scanned each page of a document, and checking that the quality of the scan is adequate. When a problem occurs, the user or administrator is notified.

### **Platform for the Enterprise**

A single KwikTag system lets users profile documents into multiple eDOCS libraries on multiple servers, making KwikTag the easiest multiple office solution to administer, and further extending the value of KwikTag to the enterprise.

### **Stable, Repeatable for Other Applications**

KwikTag for eDOCS is powered by KwikTag’s KwikConnect KwikConnect simplifies integration to applications like eDOCS, requiring fewer lines of code to integrate, and thus creating more stable integrations. The power and simplicity of KwikTag KwikConnect has been used to add paper-capture to other law firm applications, and it may be used for your custom applications, as well.

For taming the paper monster, KwikTag is the most comprehensive and expandable tool for the enterprise. Use it to get paper into your DMS, get control of the paper in billing and accounting, scan documents so they can be emailed, scan and repurpose documents for editing in MS Word and other applications, while KwikTag automatically tracks all these activities for audit and compliance.

KwikTag will give you the control you need for the paper in your firm.

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