SceriS®

ETCETERA® ECM
Enterprise Content Management

MEETING TODAY'S NEEDS AND TOMORROW'S VISIONS

ETCETERA® Enterprise Content Management (ECM) is the ETCETERA® module for online browser-based document and file management. Built on a Microsoft foundation providing extraordinary performance, ECM is a technology platform used to organize, acquire, catalog and access documents and files.

The system is easily personalized to meet each client's unique requirements. In its most basic use ECM is an electronic document repository used for scanned documents; graphic files such as PDFs, JPEGs and DICOMs; over 100 file types including emails and emails with attachments; print files from host applications; and managing documents presented by the ETCETERA® EPM application environment.

The presentation of these files is through a Scalable Vector Graphics (SVG) viewer supporting HTML5 as well as access on mobile devices.

ECM integrates seamlessly with ETCETERA® EPM and a multitude of host applications and is widely used to enable other applications including online or web-facing applications and various digital platforms.

User authentication is provided with ETCETERA® users, and Active Directory or SAML integration for single sign-on. User authorization manages user permissions and document security features limit what data and documents users can access.

ECM provides for process reviews and authorizations, alerts users to specific events or conditions, and seamlessly enables other applications with supporting documentation. ECM helps organizations achieve compliance requirements.

Many robust features, including Robotic Process Automation functions, help reduce human effort and deliver solution efficiencies leading to a very low total cost of ownership.

Deployment options include on-premises, in the ScerIS cloud or in the client's cloud.

ETCETERA® ECM helps organizations accomplish *MORE* with *LESS*.
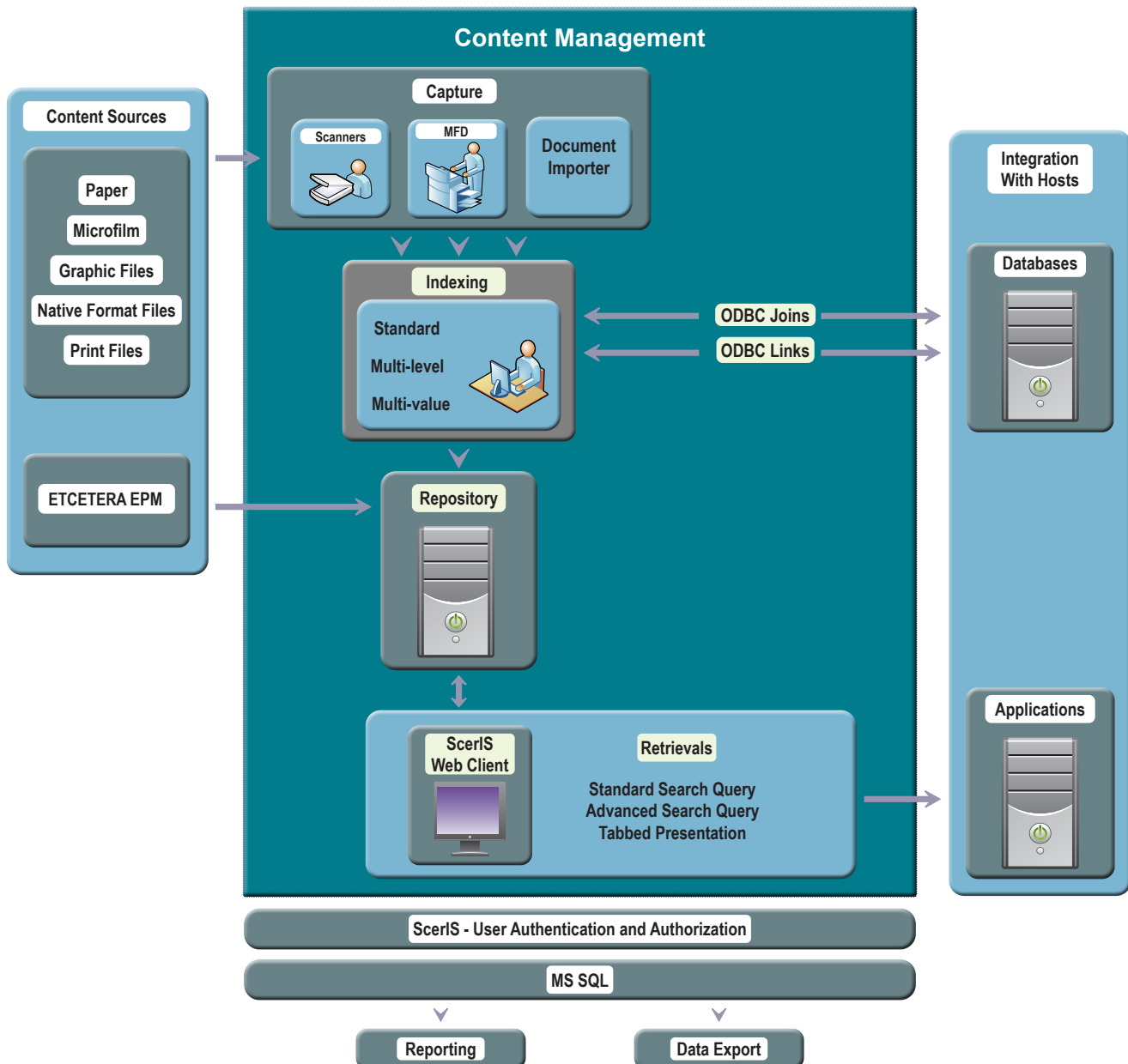
IMPLEMENTATION OF ECM - EASY AS 1 – 2 – 3

1. DESIGN

The ScerIS Solutions Team is your full-service resource helping you determine and document your requirements for Electronic Document Management Solutions using ECM. This team works with you through all project planning including strategic requirements definition, hardware selections, and defining document management processes.

2. DEVELOP

The ScerIS Solutions Team works with your assigned administrators to develop and implement system requirements for document classes, new process requirements, methods for document capture, document indexing, integration to host applications and databases and security requirements. The solution created is personalized to your organization's needs.

3. DEPLOY

The ScerIS Solutions Team works with you to implement your solution(s), develop relevant user documentation and provide training for users. A goal of all ScerIS implementations is to help each customer become self-sufficient with their ECM environment. This team works closely with your team to ensure complete, end-to-end project satisfaction.
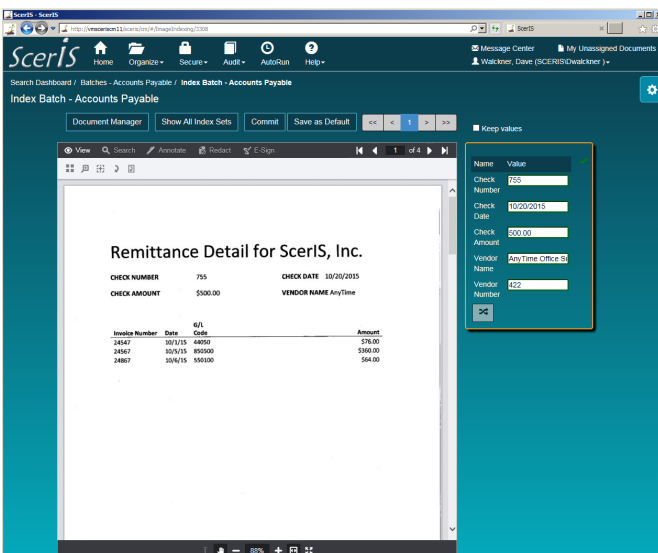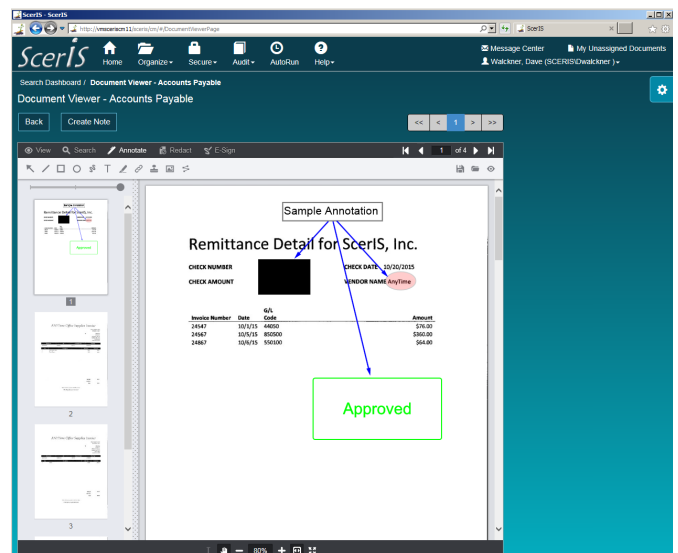
SAMPLE ECM SCREENSHOTS
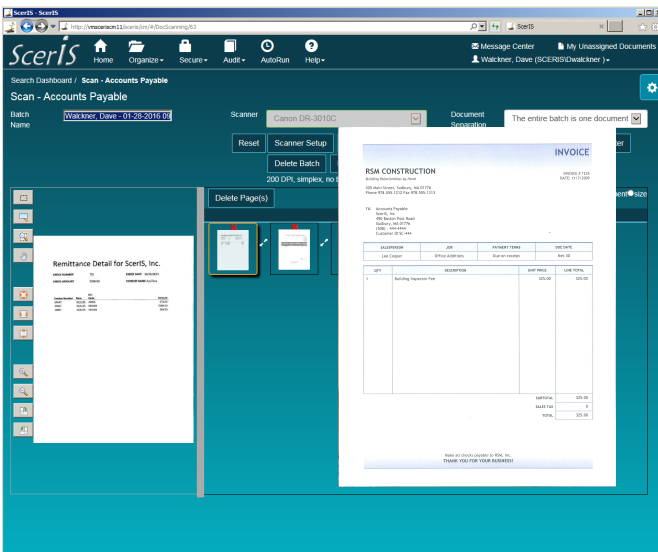
Scanning Interface
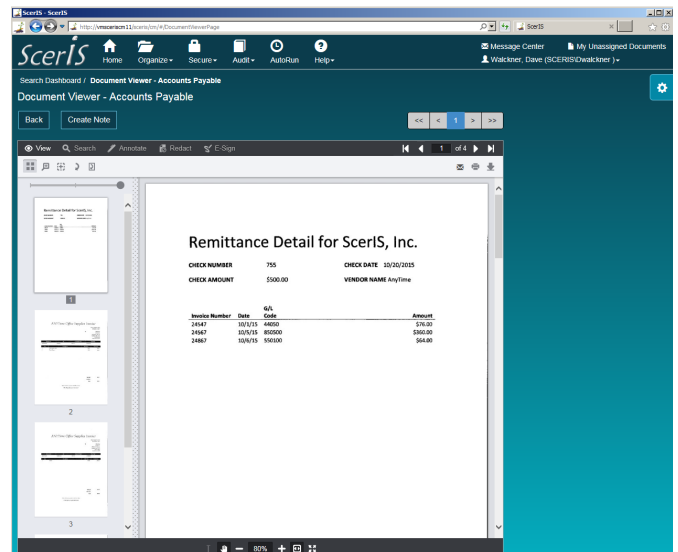
Standard Search Results with Image

Indexing Interface

Tabbed Search Results with Image

ETCETERA® ECM FUNCTIONS

Administration

Creating Document Classes
  Create New Document Class
  Clone Document Class
  Scanned Documents
  Native Format Files
  Print Files
  Disallow Duplicate Primary Indexes
  Apply Multi-Value Indexing
  Setup Index Values
    ASCII
    Date
    Decimal
    Predefined Values
    Interactive Module
  Assign Volume Group
  Assign Retention Code
  Creating Indexes
  Add ODBC Join
  Add Bar Code RecognitionDetermine
  Index Prefill Source
  Image Release to Assigned Path

User Profiles
  Advanced Password Policy
  Password Expiration Period
  Menu/Access Level
  Allow Notes Creation
  Allow Notes Viewing
  Notes Signature
  Document Class Security
  Document Security
  User Profile Cloning
  ScerIS Authorization Service
  Single Sign-On

Assign Document Class Security

Assign Document Security

Delete Documents

Delete Document Classes

Look-up Tables
  Setup
  Attach/Detach to Document Class
  Apply Values

ODBC Joins
  Setup
  Connect
  Index
  Search

ODBC Links
  Setup
  Attach/Detach to Document Class

Tabbed Presentation
  Setup
    Define Document Hierarchy
    Assign Tab & Text Color
  Attach/Detach to Document Class

Document Retention
  Setup
    Define Retention Periods
  Assign Retention to Document Class

Purge by Retention
  Setup
    Define Purge Schedule
    Define Purge Actions
  Assign Purge to Document Class

Modify Document Index Values

Re-index Documents

System Configuration Management
  File Locations
  General
  Archiving

Enable/Disable Activity Logging/Audit Trails

Document Capture & Indexing

Scan Batch/Document

Scanner Setup

Barcode Setup

Document Separation

Batch Controls

Process
  Start Batch
  Pause
  Scan One
  Delete Page
  Release Batch
  Resume
  Delete Batch

Import Batch/Document

Indexing
  Predefined Index UDI Order
  Image Handling
  ODBC Join / Link
  Advanced Settings
  Applying Look-up Tables
  Show All Index Sets
  Keep Values
  Un-indexed Batch Management

Document Manager
  Mark For Rescan
  Rotate 90 Clockwise
  Merge With Previous Document
  Jump to Next Marked Image
  Split Document on Selection
  Delete Selected Document
  Delete Selected Page(s)
  Unmark Selected Pages
  Scanning Controls
    Rescan Current Page
    Insert Page Before Selected
    Insert Page After Selected
  Advanced Options
    Sort by Document
    Sort by File Size (Largest to Smallest)
    Sort by File Size (Smallest to Largest)
    Scanner Setup

Document Searching, Retrieval & Viewing

Searching and Retrieval
  Standard Search Query
  Advanced Search Query
  Search Results
  Tabbed Presentation Results
  User Defined Search Preferences
  Text Search
  Print
  Export
  Send To (Email)

Document Viewing
  Image Handling Functions
  Adding Notes
  Viewing Notes
  Image Redaction
  Print File Viewing (with Form Overlay)

User Defined Document Search

Groups
  Setup
  Public/Private Access
  Set Index Order

Pack and Go
  Standard Pack and Go
  Pack and Go with Indexes
  Pack and Go for Spreadsheets

Seamless Integration to Host Applications

Document Capture & Indexing

Documents are captured using techniques applicable to the source.

***ScerIS Scanning and Indexing Module*:** Paper documents are captured on scanners, multi-function devices (MFDs) or fax machines. Scanned documents are automatically segmented using a patch code page. Scanned or imported documents can be viewed as thumbnails in ScerIS Work Manager where documents can be segmented or pages joined to create documents, pages can be flagged for rescanning and a page(s) missed during scanning can be scanned and inserted into appropriate page position in a document. The indexing module provides for keeping values from one document to the next to reduce data entry activity, and joins other data bases and links to external data sources to reduce keying and produce unmatched indexing accuracy. Bar codes are used for automated indexing. Multi-level indexing provides for parent and subordinate index sets, Multi-value and pointers to specific pages in the document.

***ScerIS Document Importer*:** Graphic files and other native format files are captured using the ScerIS Document Importer and indexing methods work similarly to indexing methods for scanned documents.

***Print File Importer*:** Print files are imported manually or automatically using the AutoRun Application. Print files are automatically compressed and indexes are automatically extracted using key word, positional and regular expression syntax (to find indexes in random locations).

Document Retrieval

Standard or Advanced Search Query functions produce Search Results (list of documents whose index values match those in the query). Queries can be based on exact matches, wild cards, ranges of values and <,>,< and > Print Files can be further searched using the Text Searching function. Search results can be presented in a simple listing or in a tabbed presentation that typically represents the organization of documents in paper folders.

Seamless Integration

Request documents directly from host applications using ScerIS Seamless Integration or add "Get Document" functions to existing applications and request documents using a URL address.

Security

ETCETERA® Authorization Services (AUTH) provides user authentication and authorization and serves as the access and permissions sub-system for several ScerIS applications. AUTH provides for complete customization for user groups and permissions. ECM authorizations are easily configured and are included with the ECM deployment. AUTH leverages Windows Authentication and Single Sign-On.

Data Export

Data export scripts can create and export data files from completed transactions to host computer systems in the formats required by the host applications using MS SQL scripts. Services are often provided by the ScerIS Solutions Team, but some customers are self- sufficient in this area. Typical formats include: CSV, ANSI X12 810, ANSI X12 835, ANSI X12 837, HL7 and more.

Reporting

Reports are created using MS SQL Reporting Services and customized to your requirements. Reports are often developed by the ScerIS Solutions Team, but some customers are self-reliant in this area. Training is available for clients wishing to become proficient in report generation.

Microsoft Partner

Gold Application Development

About ScerIS

ScerIS is a resource to its customers for Big Impact solutions and services. Founded in 1993, the company's focus is to help customers retool business processes, automate people centric work, improve workforce productivity and utilize key performance indicators that help position them for increased profitability.

ScerIS is a resource to its customers in healthcare, financial services, business and government. Serving 16 major markets and over 100 industries, ScerIS provides Business Process Improvement Solutions, Mobile Workforce Solutions, Custom System Design, Implementation Services & Business Process Outsourcing.

ScerIS is the software developer of ETCETERA®, the platform for business process improvement and content management. ScerIS also provides Managed Cloud Services, Professional Services and Outsourced Services rounding out its value to customers.

ScerIS®

At ScerIS, information is alive!

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