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800-735-7749

www.docushare.xerox.com

DocuShare is new to our DMS reviews this year. Xerox has developed this as a horizontal application to work in many different types of organizations. The focus is on small to mid-size businesses, although DocuShare also scales to accommodate larger organizations. It is a completely browser-based application developed in Java, which provides more portability in terms of hardware platforms. This is not an accounting firm-centric application.

Core Product Features & Functions

A variety of ways are available to interface with DocuShare in order to store and retrieve files. The My DocuShare portal is probably the most commonly used method for interfacing with the system. This entry point presents you with a configurable homepage to display information such as your “personal collection” of documents to which only you have access, a list of groups to which you belong, a tasks window listing routing tasks to which you are assigned, etc. An entry point is also available via the Outlook email client, and the separate Windows client, both of which allow you to drag and drop documents into DocuShare and perform many other DocuShare activities. A DocuShare folder allows you to store and retrieve documents directly from within the Outlook display.

A DocuShare print driver is not currently offered, however DocuShare has a PDF conversion feature to convert stored documents into PDF. An OCR engine is included that will process OCR conversions in the background, so as not to become a bottleneck in your workflows. The system tracks all activity, which can be presented in alternative report formats. 3.75

Integration

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documents according to customized routing slips that you establish to provide a roadmap for the document flow in your organization. When a document is routed, an email notification will be sent to the assignee. In the more advanced DocuShare product, DocuShare CPX, a Content Rules feature allows users to set up more advanced automated processes to occur when an event takes place. For example, when a document is uploaded to a particular folder it may automatically be copied to multiple other destinations, or initiate a pre-defined workflow. A graphical workflow design studio is available for more advanced workflow programming. 4.5

Remote Capabilities

The system is designed to be run exclusively within a browser; all you need is the URL. The system can be deployed as either an on-premise solution or as a hosted solution. Currently, no portal solution is available, but DocuShare supports integration with the Microsoft SharePoint Portal. 4.25

System Management

The system provides a comprehensive versioning feature. When a user checks out a file for editing, only that user will have the ability to store a new version of the edited file. A version history tab in the document properties window displays a complete history of the document's lifecycle.

Security permissions can be set globally or at the document level. No document retention functionality is built into the system. However, Xerox has developed a DocuShare Records Manager optional add-on module, which directly integrates IBM's Records Manager technology. 4

Summary & Pricing

The bottom line on DocuShare is that it is a horizontal solution and doesn't offer a

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