

## VisualVault Features and Highlights

### 1. Document Management Features:

Capabilities of VisualVault to organize and store electronic files and information

**Model Your Organization** – Use VisualVault to establish a controlled repository with version management with approval processes by workflow.

**Document Library** – Establish multi-level folders, with complete document type definition, inherited properties and folder level approval processes. Drag & drop capability for folders and documents.

**ID Cards** – Details regarding the history, revisions, related items, security and audit trail for every file. Establish custom index fields and metadata.

**Version Control** – Full library services to check in/out documents for controlling changes and to record file lifecycle. Older versions are retained and can be accessed.

**Compound Documents** – Associations can be maintained between documents, forms and projects. Establish hierarchical or related relationships.

**File Subscriptions** – Users can subscribe to documents for direct email notification of changes or for tracking other events related to the document.

**Record Management** – Establish plans for managing the document release, review and end-of-life processes to archive or delete files.

### 2. Search and Retrieval Tools:

Fast and accurate search capabilities

**Search Security** – The security model deployed in VisualVault ensures that users are limited to documents for which they have permission to see. Unauthorized access is prevented.

**Metadata Search** – Users can rapidly search for documents by name, keywords, descriptions or any custom index field data.

**Full Text Search** – Search within the content of all MS Office file types, PDF, rich text files or HTML. Add i-Filters to search through unique file types.

**Saved Searches** – Customized searches can be saved for routine use or future reference. You can publish these searches to other users.

### 3. Workflow & Collaboration:

Task management and tracking for approvals, BPA and notifications

**Role Based Portal** – Personalized content and tasks is customized for the user. Controls can be added to the portal for additional data and analysis.

**Workflows** – Workflows can be automated or set-up uniquely for a document or folders. Structured business processes can be established with ease. Map your business rules with conditional workflow.

**Capture Tools** – VisualVault supports scanner, fax and email for direct import of files and index data. Use in conjunction with 3<sup>rd</sup> party tools to fully automate processing.

**VisualVault SDK** – Leverage the power of information processing and web services. The VV SDK will provide full integration to your other core business systems.

### 4. Smart Forms & Reports:

HTML form creation, process management and oversight

**HTML Forms** – HTML data collection forms based upon can be created in VisualVault for specific requirements. Stored in a SQL database, data retention integrity is preserved while the form is processed.

**Process Dashboards** – Give different views into any form process with custom views of form attribute and field level data. Lists can be filtered for rapid find of any key information.

**Custom Pages & Menus** – Establish organization of your content to ensure ease of access, retrieval and oversight.

**Reports** – Detailed queries can be easily written and saved as reports from the form data records. Data can be exported to XML, Word and Excel formats.

### 5. Training Record Management:

Unique to VisualVault, training requirements are managed and users tracked for compliance.

**Document Set-up** – Any revision change or addition of a document to a category tied to training requirements will trigger an email and task to the user.

**Training Records** – Training is tracked to the individual user. Any new user added to a group will be notified of all outstanding and related training requirements. Supervisor oversight allows for tracking progress against training goals.

### 6. Easy Set-Up:

VisualVault is easy to install and administer.

**Installation** – Installation is made easy through automated installer and database administration tools.

**User Account Admin** – Integration with Active Directory, NT or Novell e-Directory. Users can be grouped based upon roles within the organization. Database level users can also be added

**Internet Browser Access** – Users can access and configure VisualVault with IE or Firefox.