



Southwest Solutions Group Virtual Doxx Software Application Overview

Virtual Doxx leads the technology curve with software that can be delivered in a package that exactly meets customer needs, while minimizing complexity and infrastructure. During the setup process for each Customer, *Virtual Doxx* software is completely tailored to use the

Customer's business vocabulary and terminology, with customized input screens and reports.

The software can be configured to model:

- Multiple Projects – separate business units or workflow processes within the organization
- Multiple Transaction types – the different types of business transactions within each project
- Un-filed Documents – new documents not yet filed, or “batch” document
- Filed Records – sets of related documents that must be tracked as a group
- Documents – paper or electronic documents, usually organized into Records
- Pages – images of individual document pages

Many customers apply labels to folders, documents, and other items that are tracked. Labels are not limited to documents and folders – they could be lab specimens, auto parts, boxes – anything labeled.

RETENTION SCHEDULE TRACKING

Many Customers need to track retention of key documents, in order to meet compliance and archiving requirements established by policy, law, or regulation. All Virtual Doxx software products support customized retention schedules. The retention schedule information can be printed on the label as “Archive Date” or “Destruction Date”. The retention schedule can also be displayed as an Archive or Destruction “Year Band”.

BARCODE RECORD TRACKING

Many Customers need to track file folders and other items that move, using barcode labels/scanners. Barcode labels affixed to file folders and other items allow expedited check-in and check-out processing, often from a filing room. Barcode tracking is simple, effective, and easy to use, with inexpensive wired or wireless barcode scanners attached to any PC.



ELECTRONIC FORMS

The paperless office is more of a reality than ever. E-forms can replace or enhance the use of paper forms in business workflows. Virtual Doxx can display, store, track, and archive your E-forms online, so that they are accessible from any location and easily retrieved via flexible searches that use the Customer’s business terminology. The E-forms can be web pages, or many other electronic formats.

TRANSACTION MANAGEMENT

Tracking of business transactions and related documents and workflows is a key activity within many organizations. These transactions can be nearly anything – mortgages, insurance claims, loans, hospital admissions, auto sales, doctor visits, etc. The software is configured to model each type of transaction, all required forms, all printing requirements, retention requirements, workflows, and security requirements.



RADIO FREQUENCY (RFID) TRACKING

The latest tracking technology entering widespread adoption by Customers is RFID. This is a “passive” tracking technology, since there is no need to manually scan each item individually. RFID can be used in records management to assist with passive workflow verification, security and audits. **Conducting a routine file inventory using RFID can cut your time by over 80%!**

THE VIRTUALDOXX APPROACH

Virtual Doxx can be delivered in a customized configuration to match customer business requirements. Each of the following components can be customized:

ORGANIZATIONAL MODEL

During software setup and configuration, Virtual Doxx is customized to reflect each Customer's:

- ❑ Organizational and workflow structure – by setting up separate *projects*
- ❑ Users, each assigned one or more security roles and a secure password
- ❑ Geographic structure – documents and records can be identified by *location* and movement tracked
- ❑ Approval points – organized as separate work queues, e.g. prior to record archiving or destruction
- ❑ Vocabulary and terminology, incorporated into every screen

RECORD TRACKING & MANAGEMENT

Some organizations need to track items, such as file folders, without regard to the contents of the item. It is assumed that the entire folder moves as a single unit. Applying a barcode to the folder and using a barcode scanner to scan the barcode whenever it is “checked in or checked out” generally accomplishes this. The key to setting up each project is the definition of the Data Fields for the project – the business vocabulary and terminology that will be used to describe each transaction, document, record, and page.

VIRTUAL VAULT

The core of Virtual Doxx is its online database. This database contains all customer information and serves as a secure “virtual vault” for storage of critical company documents, providing access only to authorized individuals and tracking each access. The database can model multiple “Projects” for each customer. A project can be a separate product line, a separate organizational unit, or a separate set of workflows within a Customer organization.



DOCUMENT TRACKING & MANAGEMENT

The next level of tracking is document tracking. In this scenario, Virtual Doxx must track not only each file folder as it moves, but also each individual document with the folder. A key distinction must be made between documents that are created by the Customer and documents that originate externally, and must be imported for processing and tracking. In general, much more information is available about documents that are created by the Customer – this “meta-data” (data describing other data) can also be imported into Virtual Doxx. Virtual Doxx also tracks documents that have not been filed. Unfiled documents include new documents waiting to be placed in a folder, as well as “batch” documents that will never be filed individually. Document tracking recognizes the fact that individual documents:

- May have a separate barcode uniquely identifying the document
- May be paper, image, or electronic, such as a text file or web page
- May be an original or a copy
- May be derived from a standard form, which has a version number
- Can be removed from a folder
- May not be part of any folder
- May have additional information not available on the file folder or its label

PAGE TRACKING

Some Customers need to track individual pages, in addition to entire documents and folders. These may be incoming business documents, possibly with signatures. This is often accomplished through document imaging, by scanning each page and storing an online copy in a database. Normally, these pages are “indexed” for searching, and reassembled into full documents, while each separate page retains its identity. Many customers want to process, and store them for later retrieval. Many people within the organization may need to access the document, but moving the physical paper is not feasible. One solution is to scan the document and make images available online, by any authorized person. The original paper document can be protected and secured, without limiting access or availability. Pages may also be handled individually if all documents

TRANSACTION MANAGEMENT

The full version of VirtualDoxx can track all of the information related to *any business transaction*. During the setup process, Virtual Doxx is configured to model each Customer's unique environment such as:

- Vocabulary and business terminology
- Specific business transactions and all related records, documents, pages, and workflows
- Standard sets of electronic or paper forms associated with individual transaction types
- Workflow processes and queuing required to accomplish business workflows
- In this scenario, Virtual Doxx must track every single paper or electronic document associated with every business transaction.
- Barcodes uniquely identifying the document
- Paper, image, or electronic document, such as a text file or web page
- Documents removed from a folder
- Documents that may not be part of any folder
- Additional information not available on the file folder or its label

TECHNOLOGY

Virtual Labels and Virtual Doxx are built using the latest enterprise-class software development tools, with security a first priority. Virtual Doxx is usually delivered as a web application, where customer documents are uploaded and stored on the Virtual Doxx database on our web server. The documents remain completely secure, but are accessible over the web from any location.

All of the software running on our web server is either Open Source or Java. The proprietary Virtual Labels and Virtual Doxx software is built on top of an Open Source tools and Enterprise Java Beans. Our web server is located in Texas in a secure data center. It is configured with redundant (RAID 5) storage and off-site backups are created nightly.

Virtual Doxx can run on either Linux or Windows. If required, we can install Virtual Doxx on a server located at a Customer site.



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