

Create!archive®

Digital Document Archive, Search and Retrieval

Create!archive automates the labor-intensive, manual processes of printing, sorting, filing and retrieving your business' most critical paper documents. Now your organization can automatically archive all of its ERP and business application output into easily accessible, PDF-formatted files without costly changes or customization of your existing IT systems. Leveraging Create!archive's self-service Web portal application, all archived files are indexed and made available for instant search and retrieval from a convenient Web browser, dramatically increasing the efficiency of your document processes, while reducing the costs and hassles of paper document management and storage.

Create!archive Features:

- Browser-based access to all documents stored in a secure Web application
- Scalable for both departmental and high-volume, enterprise-wide uses
- Role-based security integration with Microsoft Active Directory for streamlined user access management
- PDF-password encryption provides additional safeguards against unauthorized viewing and printing
- Select single or multiple documents for distribution via fax, print or email
- Communicate document annotations with attached notes
- Full text search on particular keywords, sentences or phrases
- User-specific views of document types and status
- Email alerts notify arrival of documents and document status changes
- Centralized archive also supports non-Create!form produced documents

Scales to Meet Enterprise Needs

Create!archive is a completely scalable solution, suitable for low-volume, departmental archive requirements, as well as high-volume enterprise-wide digital document archive, search and retrieval scenarios. Bottomline has customers archiving more than 70,000 documents at a time, with ongoing archive volumes exceeding 3.5 million documents.

Create!archive can also leverage the power of Microsoft SQL and Oracle databases, including easy-to-use document aging features. As documents age or become outdated, they can be moved to secondary, off-line repositories, or deleted altogether, increasing the performance and integrity of the archive database. Document transfers also save valuable disk space, reduce network traffic and increase search return speed.

Role-Based Access Enhances Document Security

With Create!archive, permission to view and access documents can be applied to one or more users. Users can be assigned to different groups based on their role within the organization. Integration with Microsoft Active Directory allows organizations to take full advantage of role-based access rights and permissions consistent with other enterprise applications, improving security while simplifying implementation and long-term maintenance. Additional levels of security can be configured to grant other user privileges, including the ability to print, fax and email documents stored in the archive.

Does your company need to:

- View checks, payment files, invoices, purchase orders, account statements, shipping manifests or other important documents online?
- Securely archive business-critical documents electronically?
- Comply with federal and other compliance requirements for document archiving and access?
- Present documents via a self-service extranet for customers, vendors and business partners?
- Retrieve documents in seconds - when you need them, where you need them?



Minimum Requirements

Create!archive Web Portal Server

- OS: MS Windows Server 2000, MS Windows Server 2003
- Processor: 1 GHz CPU with 512 MB RAM
- Hard Disk: 100 MB free

Create!archive Web Portal Client

- Internet Explorer 6.0 or 7.0
- Adobe Acrobat Reader 6.0 or higher (with Acrobat plug-in for Internet Explorer)

Create!archive Server

- OS: MS Windows Server 2000, MS Windows Server 2003
- Processor: 1 GHz CPU with 512 MB RAM
- Hard Disk: 100 MB free

Database Server

- OS: MS Windows Server 2000, MS Windows Server 2003
- Processor: 2 GHz CPU with 1 GB RAM
- Hard Disk: 30 GB free (for initial database creation)
- Databases (any of the following):
 - Oracle 9i
 - Oracle 10g
 - Microsoft SQL Server 2000
 - Microsoft SQL Server 2005

ORACLE CERTIFIED PARTNER

Microsoft
GOLD CERTIFIED

Partner

Complete Archive Management

Full Text Search

From the retrieval page, a database archive search can be conducted against any pre-defined field, document type, label or text component. This enables faster, more accurate search and retrieval of archived documents. Full text search also allows users to query against a particular keyword, sentence or phrase contained anywhere within the document itself.

Customized Search Screens

Custom search screens and document views can be created for each unique User Group. Document status and annotation labels are allocated by group, providing customized views of permissible document types.

Role-Based Dashboard

When users log-in, they are presented with a "dashboard" providing summary information of the documents available to them. The dashboard displays access to document types, counts of documents, documents by status and new documents by status, based on their role.

Quick View of Document Status

Document status can be configured for each document type such as "Received," "Query," "Approved," or "Paid." This enables users to quickly search and identify documents.

Embedded Annotations

Create!archive allows annotations to be embedded within the archived PDF, giving users the power to communicate detailed issues related to a document by attaching notes. Each comment is allocated to a particular "label" or type of comment. For instance, an invoice might have the labels "Quantity Query," "Price Query" or "Part Number Query" relating to specific questions on that document. Annotations can also be attached to a particular transaction that is in question. All labels are fully searchable for easy access and review.

Document Email Notification

Alerts can be set up to notify individual users and/or groups of users about new documents matching a particular condition. New documents matching the alert can be seen from the user's dashboard.

Enhanced Security Authorization

Permission to access documents can be assigned at the group and/or individual user level. User access is controlled by group permissions. This allows only certain types of documents to be viewed based on specific roles. In addition to group permissions, users can have additional restrictions applied to limit their access to documents.

Document Import

Legacy PDF documents can be imported into Create!archive with associated index files, enabling even non-Create!form produced documents to be stored as fully searchable items within the database.

Create!form Integration

Business documents created with Create!form's design tools are seamlessly archived in the database. Defining the archive index is a simple design task that leverages the full power of Create!form's data extraction and conditional logic capabilities.

Non-Create!form Encryption

Documents that originate outside of Create!form can be encrypted by setting a password in one of the index fields. This allows for a read/write restriction to be placed on selected documents.

Create!archive Implementation

With a low total cost of ownership, a typical Create!archive installation and implementation involves only a small amount of consulting and professional services fees. Installation is so simple that many Create!form users will install and configure with little or no assistance. This can be easily contrasted to other solutions which require as much as a 1:1 ratio of purchase price and consulting services.

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