Altec

enterprise document management

doc-link™

Version 3.1

Release Guide - September 2015

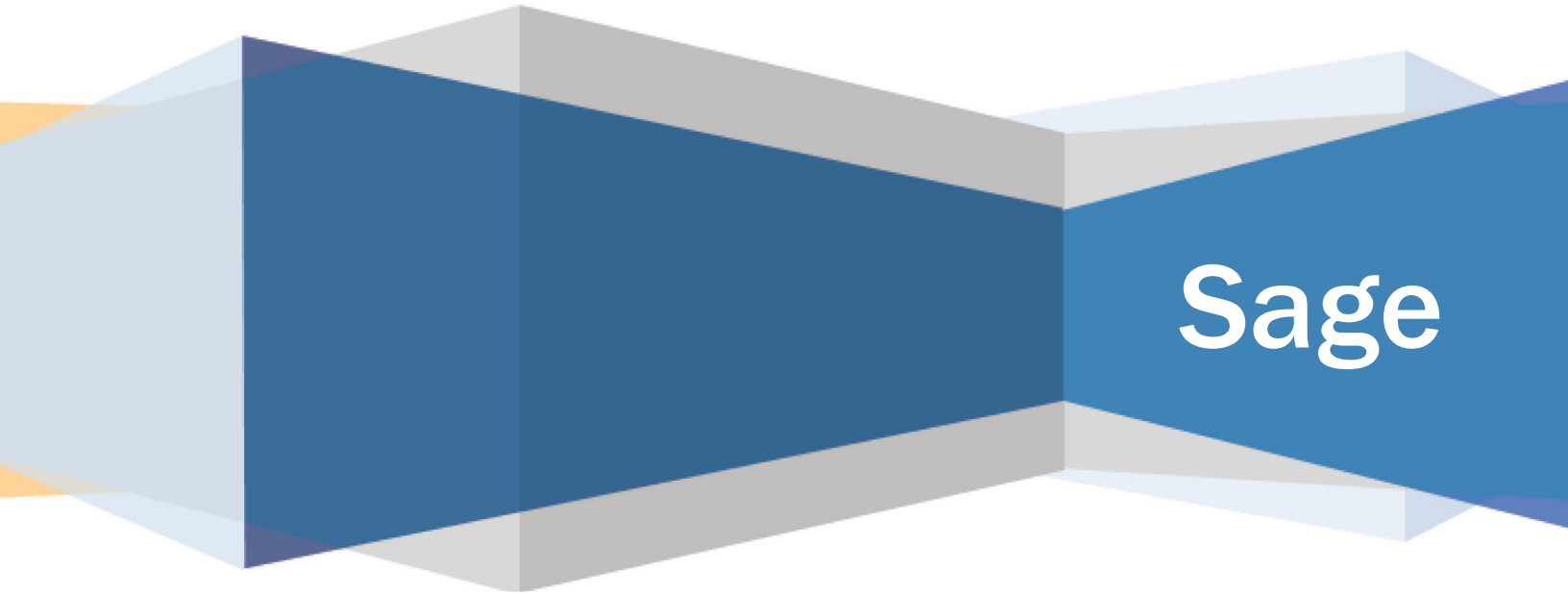
Altec delivers a major release for its flagship enterprise document management solution *doc-link*. Clients upgrading to the 3.1 release of *doc-link* will benefit from new capabilities and functional enhancements that will increase efficiency and usability throughout their organizations.

SaaS / Cloud Readiness

Mobility

Usability

Ease of Administration



The Endorsed level of certification with Sage is the highest achievable designation in the program and represents a strategic, invitation-only relationship. The program provides extensive development resources, technical services and strategic product and marketing benefits that help assure complete customer satisfaction with third-party applications. This provides vendor access to beta versions of software and advance notification of software releases for testing purposes. What this means to a purchaser is that an accounting application upgrade will not disrupt the document management software integration.

As the exclusive, endorsed integrated document management and workflow solution for Sage 100 ERP, Sage 300 ERP, Sage 500 ERP and Sage ERP X3, *doc-link* is branded by Sage as "Sage ERP Document Management." Please note that the same solution (Sage ERP Document Management) will be referred to as *doc-link* throughout this document.

Altec makes no guarantee, representations or warranties with respect to the contents of this document and specifically disclaims any implied warranties of merchantability or fitness for any particular purpose.

The contents of this manual are believed to be current and accurate as of its date of publication. Changes to this information since printing are published in the software release notes.

As each *doc-link* implementation is likely to be unique in its requirements and business processes, users of this document are always advised to discuss the content of this document with their Altec Customer Care Manager.

We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice.

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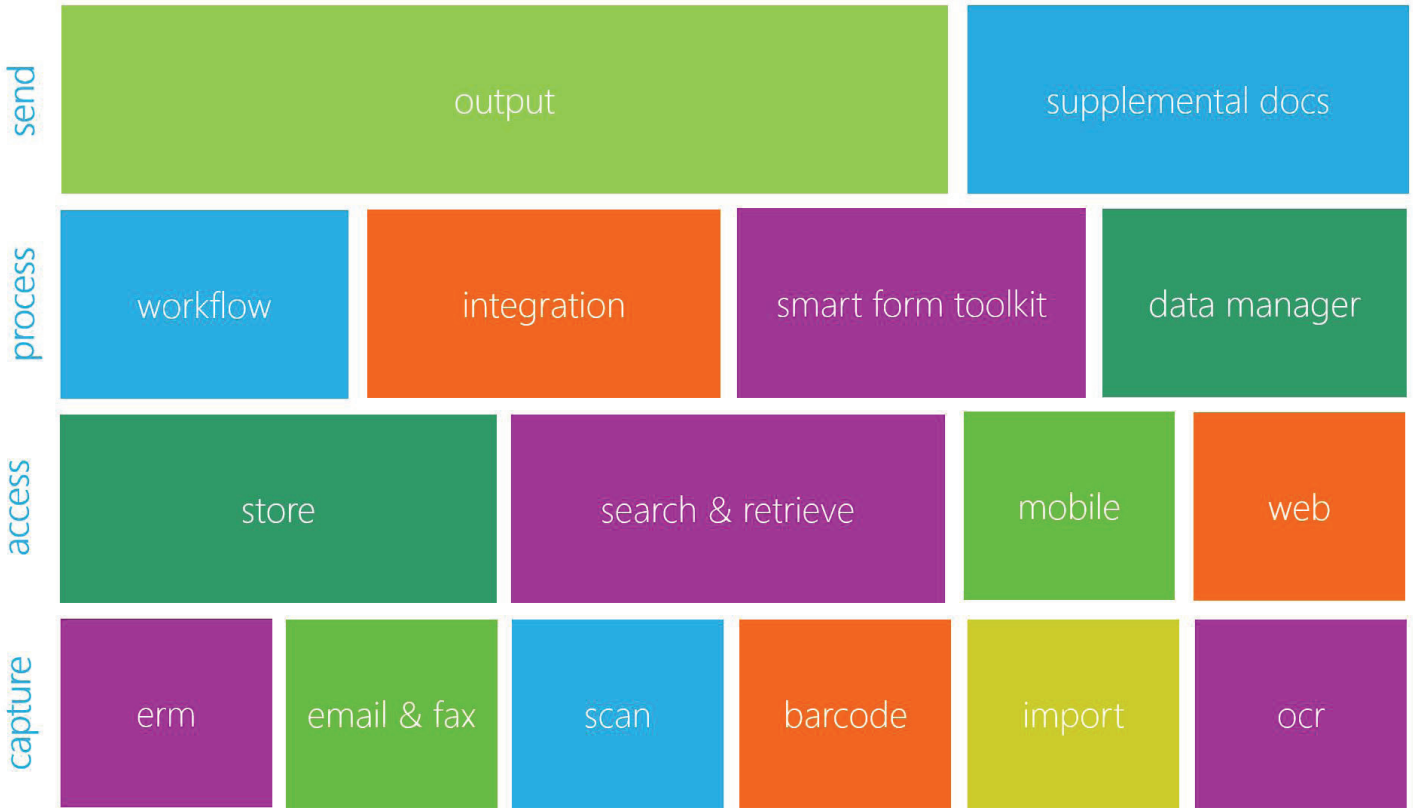
Overview

Altec's document automation solutions support business processes for the capture, processing and delivery of personalized document content. *doc-link* is seamlessly integrated to the leading mid-market ERP solutions and supports all document content (and formats) throughout the document life cycle. With *doc-link*, our 3,500 customers worldwide enjoy improved efficiency and increased collaboration; support compliance initiatives and make information easier to share.



Altec enjoys strong collaborative partnerships with ERP solution providers such as Epicor Software, Microsoft Dynamics, Sage Software and SAP B1 to provide the most comprehensive, integrated enterprise document management solutions. Altec delivers its solutions through a global network of authorized partners in more than 60 countries throughout the Americas, EMEA and Asia Pacific.

Introducing *doc-link* 3.1

The 3.1 release of *doc-link* builds on Altec's flagship enterprise document management offering by delivering exciting new capabilities to improve the solution's ease-of-use, enhance information visibility and productivity and better support business processes. The release also brings a closer alignment of Altec's strategy of offering our customers platform choices including on-premises, cloud and hybrid deployments of *doc-link*.

This guide covers the features, functions and technology introduced with this release. It also provides information on the Controlled Release program, professional services, product support, education and other important topics related to the release.

doc-link Release 3.1

***doc-link* 3.1 has been designed with four major themes in mind — Mobility, Usability, Cloud and Ease of Administration. The rapid change of technology continues to impact how and where people work. *doc-link* 3.1 provides exciting new options for accessing and working with your business-critical documents to support a mobile workforce. This release also brings *doc-link* another step closer to a cloud solution.**

THEME	ACCOMPLISHMENT
SaaS / CLOUD READINESS	Altec is committed to providing our customers with multiple deployment options. One of these is cloud deployment. In order to make *doc-link* available as a multi-tenant cloud offering, we have made architectural changes to the software — two changes of which are present in *doc-link* 3.1. Both Output Manager and Scan-link have been completely re-written in .NET. In addition to numerous functional enhancements, the re-write of these modules paves the way for a cloud delivery. Altec will continue development of its cloud architecture in version 3.2 which will be followed by *doc-link*'s initial cloud offering.
MOBILITY	Both *doc-link* Web and *doc-link* Mobile have been updated to support the new notes enhancements in *doc-link* 3.1. *doc-link* Web and *doc-link* Mobile also give today's increasingly mobile workforce greater document visibility from multiple devices and browsers, regardless of location or device, making approving and processing documents even easier.

USABILITY	With each release, Altec includes customer recommendations and enhancements focused on strengthening the *doc-link* user experience. *doc-link* 3.1 includes: • A new option for versioning *doc-link* documents • Enhanced Import Manager that monitors an email inbox to automatically import messages and/or attachments • Drag-and-drop indexing that simplifies the indexing process • Enhanced Notes with the capability to search notes' contents and the ability to include notes when emailing, printing or downloading documents • Enhanced Output Manager with full accommodation of PDFs, new options for printing, enhanced coversheet options, configurable file names and the ability to distribute supplemental documents that reside outside of *doc-link* • Enhanced Scan-link that supports the latest scanner features, automatically processes separator pages, provides a new option to promote batches for automated import and removes blank pages automatically
EASE OF ADMINISTRATION	With each release, Altec focuses on simplifying the overall administration, improving the ease of use and lowering the total cost of ownership. *doc-link* 3.1 includes enhancements that will make it easier to apply hotfixes and keep your *doc-link* system up to date: • Service packs are now provided for all hot fixes. The service pack automatically detects the current release level and takes the necessary actions to bring the system up to the specified release. • Integration database scripts are now versioned. Each time the integration database scripts are run, an entry is placed in the database indicating the current script version. This information is also displayed in the Integration Configuration and GL Smart Form Configuration windows.

doc-link 3.1 Functional Highlights

Altec is committed to enhancing the functional depth and breadth of *doc-link* for our client base as well as meeting the growing needs of a mobile workforce in the global economy.

***doc-link* 3.1 builds extensively on the product's existing capabilities to enhance the user experience and also include enhancements from customer feedback. This release focuses on overall improvements in a number of key areas.**

Output Manager

The Output Manager service has been re-written in .NET and includes extensive enhancements:

- PDFs can now be distributed via all distribution methods – print, email, fax, file copy and FTP.
- When configuring the print output method for master and supplemental documents, you can now specify different printers, different print trays and simplex or duplex based on the document type.
- The configuration has been simplified by eliminating routing list groups. Recipients are now assigned directly to routing lists.
- You can configure multiple conditions in order to specify which documents should be distributed via the routing list, including triggering of distribution based on a document's workflow status.
- Multiple property values can now be used to define the rules used to match a recipient to a routing list.
- When configuring default delivery methods, the order of the output methods and exit codes (exit on success, exit on failure and continue) are now configurable.
- A return email address can be specified for each routing list.
- Failure notifications can be automatically sent to an email address, specified at the routing list level.
- A default coversheet can be configured at the routing list level.
- Configuration of coversheets has been enhanced with additional formatting options and the inclusion of property tokens. The configuration also includes the ability to hide a token label if the property value doesn't exist.
- When configuring an email output method, email addresses for cc and bcc can be included.
- Email addresses with special characters and spaces are now allowed.
- When distributing to a dynamic recipient, a property value can be specified for use as the recipient's name.
- The document file name is now fully configurable with the use of text and tokens to create a file name template.
- Files external to *doc-link* can be configured as supplemental documents, utilizing the master document's property values to define the file name.
- The Administrator now has visibility if an email gets bounced back.
- The Output Manager service is now accessible and monitored via *doc-link*'s Service Monitor.

Scan-link

Scan-link has been re-written in .NET and includes the following enhancements:

- Scan-link has been updated to support newer scan features.
- There is no limit to the number of capture paths that can be configured.
- Separator pages can be processed in Scan-link before the batch is promoted for automated import (via Import Manager) or manual index.
- Users can save profiles that can be re-used. Profiles include settings included in the scanner's dialog such as simplex/duplex, brightness and contrast.
- Color TIFs are supported.
- Blank pages are automatically removed.

doc-link Web

- Notes can be included when a document is emailed or printed. The notes are appended to the document as a new page.
- Advanced Inquiry includes the ability to search the contents of notes.
- *doc-link* Web respects new permissions that allow users to generate Approve/Deny notes and a separate permission that allows users to generate Info notes.

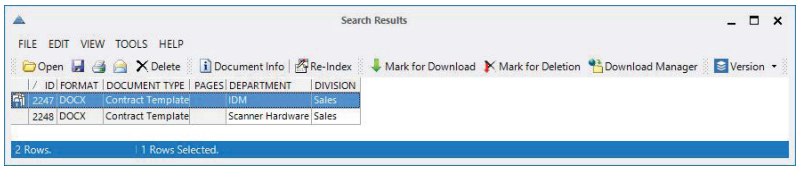
doc-link Mobile

- *doc-link* Mobile respects new permissions that allow users to generate Approve/Deny notes and a separate permission that allows users to generate Info notes.

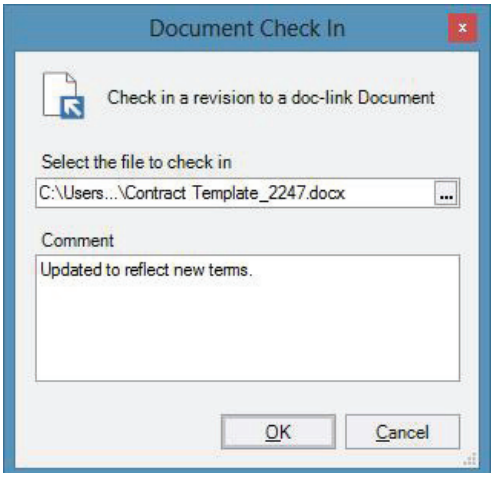
Version Control

The Smart Client now offers check-in/check-out and version control for any non-TIF or non-PDF document. Version control is designed to allow users to save editable documents (like MS Word or Excel files) in *doc-link* that can then be easily checked out, modified and checked back in as a new version of the same document.

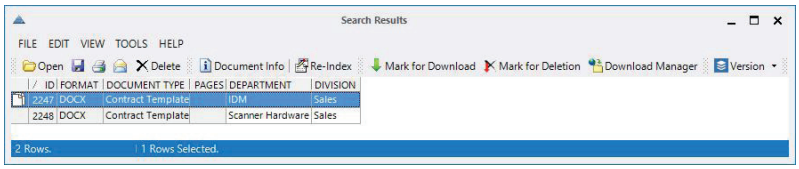
- Documents can be checked out from search results. A padlock icon is displayed in the first column of the grid indicating that no one else can check out or modify the document.



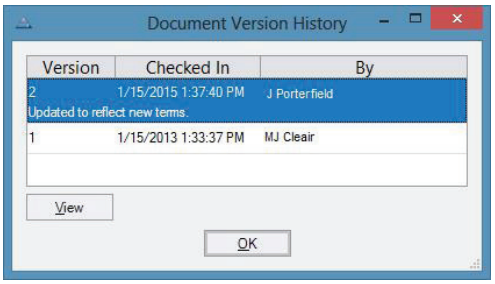
- Documents can be checked back in with comments



- An icon in the Search Results window identifies documents with previous versions.



- Press the Version button in the search results toolbar or right-click on the document to open the context menu for access to previous versions of the document.



- Administrators can reverse a document check-out.
- Two new permissions have been added to Role Manager. The first grants users the ability (by document type) to check documents in and out. The second permission grants users the ability (by document type) to view document version history.

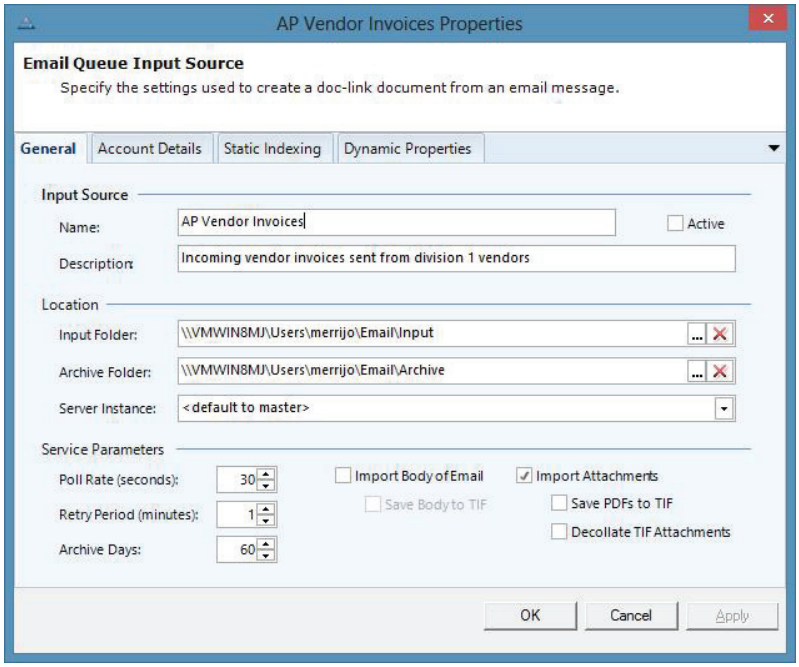
Notes Enhancements

- Advanced Inquiry (in *doc-link* Smart Client and *doc-link* Web) includes the ability to search the contents of notes.
- Notes can be included when a document is emailed or printed (available in *doc-link* Smart Client and *doc-link* Web). The notes are appended to the document as a new page.
- There are now three separate permissions for notes in Role Manager. The *doc-link* Administrator can grant permission (by document type) to create Approve/Deny notes, create Info notes and view notes.
- The Notes pane is available from the Search Results and Workflow grids in the Smart Client. Users can now apply notes to non-TIF and non-PDF documents.

- The icon in the Search Results grid that previously identified documents with annotations is now used to identify documents with annotations or notes.
- When downloading documents via Download Manager, document notes can now be included.

Automated Email Import

- A new plug-in has been added to Import Manager that monitors an email inbox and preps the email messages and/or attachments for automated import into *doc-link* via Import Manager.

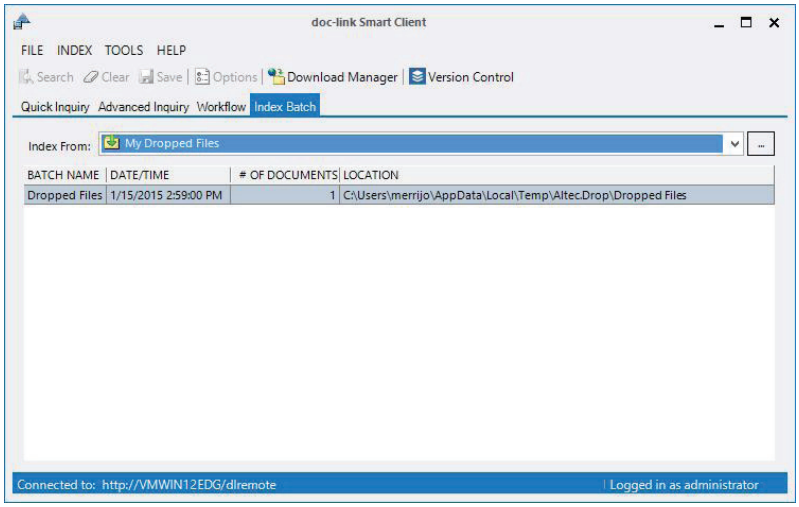


- The body of the email can be imported into *doc-link*. The email message can also be converted to TIF before import.
- Attachments can be imported into *doc-link*. Additional options for importing attachments include the ability to convert PDFs to TIF and to decollate multi-page TIF files into single-page TIFs.
- The plug-in can monitor any IMAP email account such as MS Exchange, Office 365 and Gmail.
- For each email inbox that is being monitored, the *doc-link* Administrator can:
  - Specify a static top-level folder, document type and index properties used to index all of the documents
  - Send the documents to a specified workflow status for processing and further indexing
  - Map metadata about the email message to *doc-link* properties. The available metadata includes the email address, the date the email was sent, the subject of the email, the name of the attachment, the message ID and the content ID.
- After the plug-in has processed the file(s) and placed it in the directory for import, the email message is moved to the email account's Deleted folder.

Drag & Drop Indexing

A new option for getting documents into *doc-link* has been added to the *doc-link* Smart Client. The user simply drags the files to the Smart Client icon on their desktop. There's no need to place the files in a batch folder before indexing.

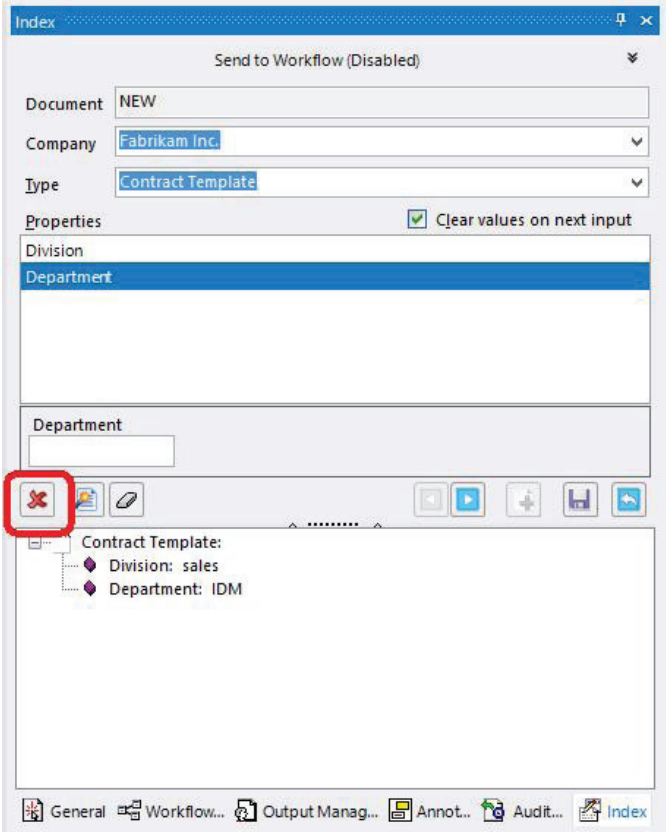
- The user drags one or more files to the Smart Client icon.
- If configured for single sign-on, the Smart Client will open utilizing single sign-on. If single sign-on is not utilized, the Smart Client will attempt to utilize any profile configured for automatic login. If none exists, the user will be prompted to log in.
- The files dropped onto the Smart Client icon will be included in a new indexing batch folder called "My Dropped Files."



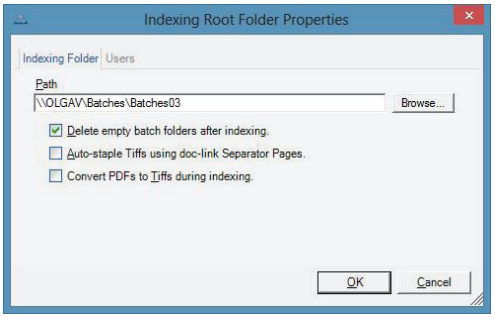
- The dropped files batch will open automatically and the user can index the files into *doc-link*.
- The dropped files are moved from their prior location rather than copied.

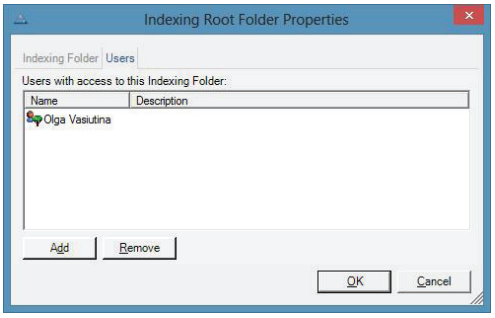
Indexing Enhancements

- The Delete button has been moved to the far left of the indexing pane, making it extremely difficult to delete an image by accident.



- The *doc-link* Administrator can now assign access to system-wide indexing paths.



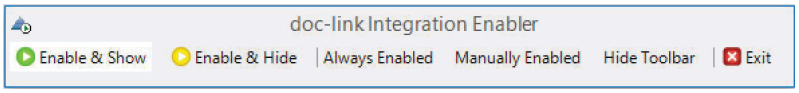


Event and Data Manager Enhancements

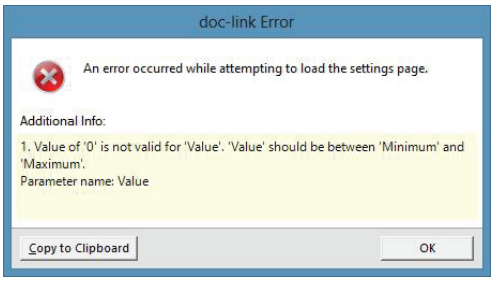
- Document notes can now be included in the body of an email notification.
- When configuring workflow automation rules, workflow category is now available in the list of options.
- When attaching a document to an email notification, you can now specify that the TIFs should be converted to PDF.
- Additional spacing has been added between the 'Approve' and 'Deny' links in the email approval template.

Other User Enhancements

- Advanced Inquiry in the Smart Client now includes an additional splitter bar that allows the user to determine the width of the column containing the top-level folders and document types.
- It's now easier to do a multi-select in the workflow grid. Hold down the control or shift buttons while you do your selection, and no documents will open in the viewer. A single click will continue to load the selected document in the viewer.
- Integration Enabler can now be accessed two different ways. You can continue to access it from the system tray. If you don't have access to the system tray, you have an additional option to display Integration Enabler as a toolbar.



- If an error is encountered, a button on the error dialog allows the user to copy relevant error logs to their clipboard. The error logs can then be pasted into an email message for support purposes.



doc-link 3.1 Administrative Highlights

Other Administrator Enhancements

- Cache table updates have been transactionalized. Table contents will no longer be deleted and reloaded.
- In system settings for SMPT, TLS is now accommodated. This allows direct connection to Office 365 without using a relay server.
- When a *doc-link* service has to be restarted, the license for that service will automatically be released.
- Session Monitor has been updated to provide session reporting. By week and type of user license, you can see:
  - Maximum number of licenses utilized at any one time
  - Average number of licenses used during the week
  - Total number of failed attempts (a license wasn't available for the user)

Deployment Enhancements

- Service packs will now be provided for all hot fixes. The service pack will automatically detect the current release level and take the necessary actions to bring the system up to the specified release.
- During the installation of the *doc-link* services, the option on the Recovery tab will be set to restart automatically. The initial startup will be set to automatic delayed start.
- Each time the integration database scripts are run, an entry will be placed in the database indicating the current script version. This information will also be displayed in the Integration Configuration and GL Smart Form Configuration windows.
- The *doc-link* installation includes a link to the Smart Client Application Launcher setup.
- When upgrading *doc-link*, GL Smart Form property mappings will no longer be wiped out.

doc-link Product Overview

Our *doc-link* customers span a variety of vertical markets. As *doc-link* is a solution that satisfies the needs of any process, department and industry, these customers currently own varying modules of the integrated document management and workflow software. Since *doc-link* is scalable and designed with flexibility for departmental to enterprise-wide applications, users can easily add on later.

We strive to ensure that our customers are aware of the full extendability of their solution. Here is a listing of the entire functionality *doc-link* can provide through various modules.

CAPTURE & INDEX	
ERM	The ERM module facilitates the automated capture, indexing and archiving of printed output from ERP or other business systems. ERM involves the scripting of the initial template that identifies the document type being processed and the respective fields that are to be captured as index properties. Altec will train you on the initial set up of new documents processed by the ERM module. You may elect to engage Altec Professional Services to create additional templates or alter existing templates at an additional charge.
ERM Processing for PCL	The *doc-link* ERM module captures EMF-based spool files. In rare instances where the originating application does not produce EMF, it may be necessary for the ERM module to use technology that processes the PCL file. This add-on to the ERM module provides for the configuration and processing of PCL files.
Scan-link	Scan-link is used to capture electronic images to be indexed into *doc-link*. The Scan-link software is installed on a designated PC that is attached to an ISIS-compliant scanner with a compatible SCSI card or USB connection. Each scan station requires a Scan-link module. Scan-link allows the user to scan a batch of documents and associate a meaningful name with that batch. When selecting a batch to be indexed, *doc-link* will display that meaningful name to the user. In addition, Scan-link places a lock file in the batch when the batch is open so another user can't accidentally open up the batch and start processing documents at the same time. Note: if you can already scan TIFs to a directory, you do not have to use Scan-link.
Auto/Retro-Index	The Auto/Retro-Index module automates the indexing process by using a unique index property to search an ODBC compliant database for additional index values. Auto-Index can be used during manual index, re-index, ERM capture, barcode processing, direct import using Import Manager and workflow. Retro-Index can use a triggered or scheduled event to perform additional indexing of a previously indexed document, which is helpful when the index property does not exist at the time the document is originally saved in *doc-link*. Altec Professional Services will create and/or help you create Auto-Index or Retro-Index profiles for the documents utilized in the business process. Altec will train your IT staff to create profiles for other documents to enable additional profiles as needs dictate. Since there are various ODBC products available, it may require use of a different ODBC driver than currently in use. This will be determined at the time of the implementation.

Import Manager	The Import Manager is used to import documents and/or XML data into *doc-link*. This flexible service can be used to import: • Images that have been processed through an OCR package • Documents into the *doc-link* repository and index them with the OCR and/or XML data • Images created from an XML file. Import Manager uses SQL Reporting Services to transform the XML data into the proper layout. • Documents and XML data sent from another *doc-link* system by Output Manager • Images without a corresponding XML file. The top-level folder, document type, properties and workflow status are configured for the input source and each document is indexed with that static data. • Data associated with documents already in the *doc-link* repository • The XML to update index properties or move the document to the next workflow status OCR software is not included. If using to import OCR data, confirm with Altec that the output from the OCR package is compatible.
Custom Import Manager Plug-in	Custom plug-ins are used to capture images and XML metadata from 3rd party applications for automated import into *doc-link* via Import Manager. Contact Altec for more information about available plug-ins.
Barcode	The Barcode module enables barcode recognition and indexing of CCITT Group IV TIFF files by reading information contained in a barcode. Documents that are provided by an external source can be placed in a folder that the Barcode service polls. When the service detects images located in this folder, the Barcode module will attempt to read the barcode, associate the image to a document type and index properties based on information contained in barcode data. If configured to do so, Barcode will call Auto-Index (requires the Auto/Retro-Index module).
Fax-link	Fax-link assists with the automatic capture and preparation of multi-page TIFs (such as faxes received electronically and TIFs created using network scanning devices). Fax-link monitors an incoming directory for these new multi-page TIFs, de-collates any TIFs found in that directory and then moves the de-collated TIFs to a completed directory. Fax-link supports specific handling of incoming faxes and provides the ability to define frequent fax senders for special routing to a predefined network folder based on the CSID information.

PROCESS	
Workflow	The Workflow module provides process management features that move documents electronically through an organization. It includes Workflow, Workflow Manager (to configure workflows), Workflow Supervisor/Monitor (to monitor and/or modify a document's status) and Workflow Delegation. Note that to send automated reminders when the delegation request period is ending or when the delegation period is starting and ending requires Data Manager.
Event Manager	The Event Manager module monitors *doc-link* events and sends email notifications to alert users when the events occur. Monitored events include: • Documents sent to a workflow status • Overdue documents in a workflow status • Documents created • Documents captured by ERM (success and failure) • Documents imported using Import Manager (success and failure) • Documents distributed by Output Manager (failure) • Documents indexed with new property values
Data Manager	Data Manager is an add-on to Event Manager and includes the ability to automate processes based on monitored *doc-link* events or a scheduled event. Automated processes can include moving a document to a workflow status, a database action or executing an external application.
Quick-link	Quick-link provides the tools necessary to integrate *doc-link* with various line-of-business Windows applications, text-based programs running in terminal emulators and web-based HTML applications. Quick-link provides for the mapping of application screen fields to *doc-link* properties and definition of keyboard and mouse events to perform various functions such as indexing or retrieving *doc-link* documents from within the line-of-business application. NOTES: 1) Integration with line-of-business application must be validated prior to purchasing this module. 2) Pricing is based on the number of integrated screens (purchase of Quick-link includes integration with three screens with additional screen integrations purchased as add-ons).
Smart Form Toolkit	The *doc-link* Smart Form Toolkit provides the ability to configure custom Smart Forms. Smart Forms are custom windows that can be used to provide a rich user experience for creating documents, indexing documents, retrieving documents or streamlining business processes. This includes five (5) Repository User licenses. Before purchasing the Smart Form Toolkit, confirm with Altec that it will in fact meet your requirements and to determine any necessary services required. NOTES: 1) Data Manager is required if using the Smart Form Toolkit to create a document that must be sent to *doc-link* Workflow automatically. 2) Use of a Smart Form hosted in a tab in the Smart Client requires a Repository User License.

***doc-link* SDK**	The *doc-link* Software Development Kit (SDK) provides the data and interface documentation, code samples and tools needed to develop custom integrations to the *doc-link* Smart Client utilizing the .NET platform and the *doc-link* Web Client (*doc-link* 3.0 and higher) utilizing web services, web parts or JavaScript. SDK includes the URI syntax for URI Drill-down. This includes five (5) support cases. Before purchasing the SDK, confirm with Altec that the SDK contents will meet your business requirements.
URI Drill-down Documentation	The documentation explains how to utilize URI to retrieve *doc-link* documents from within a business application. Retrieved documents are displayed in the *doc-link* Smart Client. This includes five (5) support cases.
DISTRIBUTE	
Output Manager	Output Manager automatically distributes documents to business partners or employees based on pre-configured routing lists and distribution methods. If the routing information (email address/fax number) is located on the document, Output Manager can use that information to dynamically route the document without configuring recipient information in the database.
Supplemental Documents	The Supplemental Documents module is an add-on to the *doc-link* Output Manager that locates and collates all backup documents before routing. The Supplemental Documents module can automatically distribute documents in *doc-link* with backup documents via all supported output methods: print, email, fax, FTP and file copy.
ACCESS & USER LICENSES	
***doc-link* Repository**	The *doc-link* Repository provides storage and retrieval of *doc-link* documents and files.
Repository User License	A Repository User license is checked out when the user first indexes, creates or retrieves a document (any action other than a workflow action which checks out an Integrated/Non-Integrated Workfloww User license). This includes the use of Smart Forms hosted in a tab in the Smart Client. The Repository User license is checked back in when the user closes all Search Results, Viewer or Indexing windows or disables a Smart Form hosted in the Smart Client.
Non-integrated Workflow User	The Non-integrated Workflow User can view documents in their workflow status, place stamps, annotations or GL stamps on the documents and move documents to the next workflow status. Non-integrated Workflow Users cannot utilize integration functionality nor import GL stamp data into the ERP system. A Non-integrated Workflow User license is checked out when the user opens workflow and is checked back in when all workflow windows are closed.
Integrated Workflow User	Integrated Workflow Users can utilize workflow in conjunction with Integration Enabler functionality, create GL stamps and import GL stamp data into the ERP application. Note that utilizing integration and GL stamp functionality requires the purchase of an integration and/or GL Smart Form. An Integrated Workflow User license is checked out when the user opens workflow and is checked back in when all workflow windows are closed.

Web Client	The Web Client provides access to *doc-link* documents via web browser (Internet Explorer, Chrome, Safari and Firefox). The Web Client can be used as a portal for business partners or web client for *doc-link* users. The Web Client respects *doc-link* roles and property-level security, ensuring that users have access to the appropriate documents, and it requires an internet connection. Through the Web Client, a user can: • Search • View and send workflow documents • Apply permanent notes • Output (print, email, fax (to a fax server), save to file) • View (but no ability to annotate documents) This requires a Repository User license when a *doc-link* user conducts a search (Quick Search or Advanced Search). It requires a Non-integrated Workflow license when a *doc-link* user opens a workflow as well. No user license is required when an external user logs into the Web Client but external users have access to Quick Search only. The Quick Search widget can also be hosted in a SharePoint page to allow access to *doc-link* documents from within SharePoint.
Web Client Test Server	Additional copy of Web Client for installation on a test server.
***doc-link* Mobile**	*doc-link* Mobile provides access to *doc-link* documents via Android and iOS devices. The *doc-link* Mobile app respects *doc-link* roles and property-level security, ensuring that users have access to the appropriate documents. This requires an internet connection. Through the *doc-link* Mobile app, a user can: • Search • View and send workflow documents • Apply permanent notes • View documents (but no ability to annotate) • Download documents It requires a Repository User license when the user conducts a search and a Non-integrated Workflow license when a *doc-link* user opens a workflow.

Product Support Schedule

In order to provide enhanced functionality, updated architectural platforms and superior customer support, it is necessary to retire development support for older versions as new versions are released.

With the release of *doc-link* 3.1, Altec's Development team will continue to provide hotfixes and development support for *doc-link* 3.0 and *doc-link* 3.1.

If you are on an older version of *doc-link* and would like to upgrade to a supported version, please contact:

Lori Corbino
Customer Care Manager
Phone: +1.949.727.1248 x1224
Email: loricorbino@altec-inc.com

Sage Product Integration List

***doc-link* is the only integrated document management solution endorsed by Sage for these product lines: Sage 100 ERP, Sage 300 ERP, Sage 500 ERP and Sage ERP X3. Other software providers may have integrations but they would not be developed in partnership with Sage nor backed by Sage.**

The Endorsed level of certification with Sage is the highest achievable designation in the program and represents a strategic, invitation-only relationship. The program provides extensive development resources, technical services and strategic product and marketing benefits that help assure complete customer satisfaction with third-party applications. This provides vendor access to beta versions of software and advance notification of software releases for testing purposes. What this means to a purchaser is that an accounting application upgrade will not disrupt the document management software integration.

Product Distribution

Controlled Release Schedule

doc-link 3.1 includes the functionality described in this Release Guide. Please note that controlled release testing should be performed in a test environment using data copied from your company's production system. It is critical that pre-release software be installed in a completely separate test environment—not a live production environment.

Controlled Release Dates

The first 3.1 controlled release site released on June 1, 2015, with a second controlled release site released June 15, 2015. There are no plans to release any additional controlled release sites prior to GA.

doc-link 3.1 Controlled Release Distribution

The benefits of being part of a controlled release site includes early access to product updates and functionality; dedicated development staff assigned for accelarated resolutions should any issues occur; a 50% discount on services to complete the upgrade and discounts on additional modules and/or user licenses.

For those companies seeking to be future controlled release sites, testing can be scheduled with you directly by our Customer Care Manager, Lori Corbino.

GA Release Schedule

Release Dates

doc-link 3.1 releases for general availability September 2015. While every effort will be made for a timely release, quality is of utmost importance and the controlled release will not be concluded until all critical issues are addressed and controlled release sites have successfully implemented and moved to production.

doc-link Release 3.1 Upgrade Distribution

The *doc-link* 3.1 release will be available for upgrade by contacting your Customer Care Manager, Lori Corbino. Altec will provide you a detailed project plan for upgrading *doc-link* to version 3.1. Your upgrade also includes a system health check to better match your current situation and optimize the use of *doc-link*.

Client Support

At Altec, we are committed to providing high-quality service and support to our clients.

Altec's highly trained analysts provide technical support on all of our products. Our analysts will become familiar with your specific application and environment and provide assistance with questions or problem issues as they occur. We work closely with the technical support departments of software publishers to resolve programming issues. Our goal is to provide timely support and quick resolution in a manner that causes the least disruption to normal daily operations.

Our extensive client support programs provide flexible, friendly and uniquely focused solutions. From onsite visits to phone access to e-mails to website access, our support programs give you the flexibility and options you want, the resolutions you need and the assurance that your solution will deliver the value and benefits you expect.

Support Guidelines

Our analysts provide assistance with questions or problem issues as they occur.

Contact Information

Support can be obtained 24/7 at:

Phone: 800.997.9921 x1259

Email: support@altec-inc.com

Regular Support available:

6:00 AM – 6:00 PM PT Mon – Fri

After-Hours Support available:

6:00 PM – 6:00 AM PT Mon – Fri, Sat - Sun

After-Hours Support

After-hours support is classified as support engagement that falls between 6:00 PM PT – 6:00 AM PT Monday through Friday and all day Saturday and Sunday. Typically there is an additional charge for after-hours support engagements.

Costs

Support is billed in 15 minute increments. After-hours support is billed at a higher hourly rate. The regular and after-hours rates are determined by your support maintenance agreement. There are some notable exceptions:

- Any support time logged that results in identifying a defect in the software is not billed.
- Any support time logged to deploy a hotfix to resolve a defect is also not charged.
- Any time associated with a project is billable in its entirety as per signed agreement letter.

Escalations

We operate on a 3-tier support structure and will resolve or escalate appropriately.

- Tier 1: initial assessment, information gathering and resolution if possible
- Tier 2: escalation of complex support issues to senior support staff
- Tier 3: escalation to Development for resolution of a product defect

All support cases submitted are prioritized as follows. We work all open cases in priority and date order.

PRIORITY	DESCRIPTION	RESPONSE TIME
CRITICAL	• System is completely down and cannot proceed without assitance • Users are unable to access the applications	Within 30 minutes of submission
URGENT	• Multiple users impacted • Error in business critical processes	Within 30 minutes of submission
NORMAL	• You are able to complete processing but require assistance with functionality or change in configuration • Installation support • Training requests • Test server implementation	Within 1 hour of submission
LOW	• Request for information • Enhancement request submissions • General question	Within 24 hours of submission

Support Life Cycle

Altec Support strives to provide installation, configuration and workaround assistance to customers on any version of the *doc-link* product but our Development team will only provide code changes and hotfixes for the current *doc-link* version and the previous product version (current version – 1).

Note: A hotfix is a modification to the *doc-link* product software code to address specific critical problems.

Customer Escalation Guide

The information above is the escalation matrix Altec customers can leverage at any time they feel that they are not getting the appropriate level of attention to their issues. Due to the critical nature of your concerns, you can reference the escalation path that goes to the top of our organization. Please feel free to use this information to bring visibility and closure to any issue you feel needs more attention.

Senior Management Support

Cathy Champlin
Customer Support Manager
Phone: 800.997.9921 x1295
Fax: 253.274.0007
Email: cathychamplin@altec-inc.com

Professional Services

Altec's Professional Services Group offers best practices and a suite of services for optimizing document management for your organization. Our business process and implementation experts have successfully deployed solutions for organizations of all sizes including global corporations and single-location practices. Our consultants are committed to helping clients realize maximum benefits from their software investment and stand ready to assist any client in upgrading to *doc-link* 3.1.

With the continuing objective of successful implementation, the Professional Services Group delivers flexible, knowledgeable product implementation services. The implementation technical resources effectively contribute a skilled level of expertise with each function of *doc-link* and how to best maximize its utilization for the efficiency of your organization.

Business Process Consulting

Business Process Consulting includes the critical analysis and redesign of existing processes to achieve improvements in return-on-investment (ROI) metrics such as revenue, cost reduction and cycle time. Our team assesses to understand your existing processes and maps the goals of those processes to available technology enablers. From this analysis, we develop a solution to meet and exceed your target metrics and bring about positive change through a partnership with technology.

Best Practices Consulting

Through our experience in developing and deploying solutions in many environments, we have compiled best practices and lessons learned to ensure we can provide you with the highest quality solution to meet the needs of your business. We are constantly updating and revising our best practices and documentation as we continue to grow and expand our software capabilities.

Technical Consulting

Altec consultants can help you establish your technical environments, trouble-shoot technical issues, enhance performance and develop a strategy for your migration, integration and business intelligence requirements.

Project Management

Altec will assist you with project management to ensure your effort continues to move in the right direction. Altec's project managers and coordinators provide value added services to monitor that your project stays on track and keeps you apprised of any new developments that affect the overall implementation. Altec's proactive communication to get your organization prepared—and excited about—the changes that will take place to ensure end user acceptance and overall success of the project.

Upgrade Services

Altec is committed to simplifying the upgrade process and providing high quality services. Altec offers a comprehensive suite of services to aid you in any *doc-link* implementation. Our Project Outline is geared to provide you with insight into the overall processes involved in a successful upgrade to the latest *doc-link* release.

An Altec consultant can help tailor a custom project plan that includes the appropriate services for your site. This may include project management services, technical consulting, business process review and training services

Product Education

Applying the most current techniques and theory for education, Altec's training specialists employ a modular approach to developing and delivering both on-site and web-based training. Our comprehensive, instructor-led educational programs are specific to each solution and may be customized to meet the needs of your business.

Our professional trainers offer hands-on experience in purpose-built surroundings which boosts user efficiency and significantly increases the returns from your training and technology investment.

Altec offers a full suite of classes taught by training professionals to help make your implementation successful. Courses can be run at one of our fully equipped training centers or at your own site. We can even offer remote training sessions, should that best meet the needs of your organization.

Our training experts can also help identify your exact training needs to customize coursework.

Applications Training

Training is the educational arm of the Professional Services Group. Not only can Altec help you with the essential training and consultation necessary for a successful software implementation but we are also here to help you make the most of *doc-link* throughout the lifetime of your installation.

Altec offers a variety of educational programs and vehicles to give clients the level of training needed in convenient and cost-effective formats.

- **Classroom Courses:** Attend comprehensive, instructor-led programs in our regional training facilities or in your own office.
- **Web-based Training Courses:** Obtain training remotely via web sessions. Altec offers both standard courses as well as custom training via the Internet.
- **Customized Courses:** Altec can develop training programs designed to fit the specific requirements of your team.
- **"Train the Trainer" Courses:** Altec can also provide coaching to enable your staff to train other employees.

New Release Training

As part of every major release, Altec's training curriculum is updated to assist customers in implementing and taking advantage of new applications and functionality. With the *doc-link* 3.1 release, new training updates and courses will be offered, including:

- A general training course on "What's New in the *doc-link* 3.1 Release" will be available.
- Additional courses to be announced.

doc-link Course Registration

To register for any Training course, contact information is below:

Lori Corbino
Customer Care Manager
Phone: +1.949.727.1248 x1224
Email: loricorbino@altec-inc.com

Applications Consulting

Altec also provides Application Consulting services to ensure your firm gets the most from its investment in *doc-link*.

- **Procedures and Training Manual Development:** Altec can help you create or modify internal *doc-link* procedures, documentation and custom training materials. We can also provide suggestions for how to maximize self-sufficiency with *doc-link* through recording web training sessions and our recommendations for best practices for you to use at your disposure following your implementation.
- **Business Process Reviews:** Altec can help review your current business processes and help identify opportunities to streamline and gain efficiencies remotely or in your office(s).
- **Server Moves or Test Environments:** Altec can help you with the tasks needed to install and set up *doc-link* on new server(s).
- **Image Migrations:** Altec can work with your internal team or third party vendors to get your images migrated from disparate systems into *doc-link* so that you only have one system of record for all of your document management needs.
- **Workflow Design Review and Expansion:** Altec can review your current set-up and needs to identify any opportunities to streamline or consolidate processes for existing or new departments.

- **Automation:** Altec can be introduced to eliminate manual steps in your process and leverage the systems to improve control and process efficiency. Examples can be to automate routing of documents to their respective approver by dollar amount, department code or other data points; automate the import into the ERP so that transactions can be done in bulk; automate the import of documents into *doc-link* vs. manual entry, etc.
- **Reports:** Altec can set up reports that run on demand or on a schedule for delivery via email or leverage your SQL Server Reporting Services. Examples of these reports can be Accrual Reports of documents in *doc-link*, Reconciliation reports of what is in *doc-link* vs. ERP and Production reports to show typical processing times for any of the other scenarios shown below:
    - How long is my invoice taking from receive to pay? (e.g. broken down by Company, Department, Division, AP Processor, etc).
    - How long are documents sitting in a particular workflow, status, etc.?
    - What is the breakdown of invoice being processing? (e.g. By Company, Site, Department, Division, AP Processor, etc)
    - How many invoices do I process in a given day, week, month or year?
- **Smart Forms Needs Analysis:** Altec can evaluate your current paper forms processes to see if they are a good candidate for movement into *doc-link* to ensure better visibility and alerting to ensure a document is process through the organization as required.
- **Other Services:** If there are paper or process pains in your organization, please don't hesitate to reach out to us to discuss further and help guide your organization in any department for any process.

Hardware Recommendations by Volume

Version Compatibility

Below are hardware, software and environmental recommendations for optimal usage of *doc-link*. These are not the minimum requirements but the recommendations for optimal performance based on the volume of documents that *doc-link* will be processing. No new hardware changes are required for customers upgrading to *doc-link* 3.1.

Low Volume – Up to 5,000/Month

SQL, Application Server, Document Store

- Minimum 64-bit 2.0 GHz or higher, quad core or equivalent processor
- 32 GB RAM
- RAID 5 for SQL data
- **Document Store Disk Space (5 Years) – 90 GB

Medium Volume – 5,000 to 10,000/Month

Dedicated SQL Server

- Minimum 64-bit 2.0 GHz or higher, quad core or equivalent processor
- 16 GB RAM
- RAID 5 for SQL data

Application Server, Image Store

- Minimum 64-bit 2.0 GHz or higher, quad core or equivalent processor
- 8 GB RAM
- **Document Store Disk Space (5 Years) – 175 GB

High Volume – 10,000 to 20,000/Month

Dedicated SQL Server

- Minimum 64-bit 2.0 GHz or higher, quad core or equivalent processor
- 32 GB RAM
- RAID 5 for SQL data

Application Server, Document Store

- Minimum 64-bit 2.0 GHz or higher, quad core or equivalent processor
- 8 GB RAM
- **Document Store Disk Space (5 Years) – 345 GB

Dedicated Server for High Usage Services (ERM, Import Manager, Barcode, Output Manager)

- Minimum 64-bit 2.5 GHz or higher quad core or equivalent processor
- 8 GB RAM
- **Storage estimates are general. DocumentStorageCalculator.XLS can be used to calculate closer to actual needs

Operating System and Software Requirements

Servers

Application Server:

- Windows Server 64-bit 2008, 2008R2 or Windows Server 2012, 2012R2
- Internet Information Services (IIS) ASP.Net and SMTP must be installed (IIS7 and higher)
- .Net Framework v 4.0

SQL Server:

- Windows Server 2008, 2008R2 or Windows Server 2012, 2012R2
- 64-bit SQL Server 2008, 2012 or 2014. Refer to SQL Server documentation for minimum requirements.
- SQL should be configured to use both SQL Server and Windows authentication.

Network Speeds:

Note: Monitor upload and download speeds during peak times to ensure that minimum throughput can be achieved during those times. (www.speedtest.net).

- 1.5 MPS upload and download with no more than 40ms ping times.
- 100 MBPS Fast Ethernet (1 GB Fast Ethernet ideal)

Workstations

Smart Clients:

Note: 1GB RAM should be available as free physical memory before starting Smart Client.

- Windows Server 2008, 2008R2, Windows Server 2012, 2012R2, , Windows 8 and 8.1 Pro, Windows 7
- Internet Explorer 8.0 or higher
- Dual monitor setup recommended for client installations designated for side-by-side integrations.
- .Net Framework v 4.5
- Memory requirements by operating system:
- Windows 7, Windows 8 Pro – 1GB (32-bit); 2GB (64-bit)

Scan-link Station:

Required only if can-link application is installed

- Windows 8 and 8.1, Windows 7, Windows Vista
- 1 GHz or faster processor
- 512 MB RAM recommended on Windows XP Pro
- 2 GB RAM recommended on Windows Vista and 7
- Minimum of 10 GB of available disk space for scanning
- 19” Monitor (recommended)
- .Net Framework v 4.5

Network Speeds:

Note: Monitor upload and download speeds during peak times to ensure that minimum throughput can be achieved during those times. (www.speedtest.net).

- 1.5 MPS upload and download with no more than 40ms ping times.
- 100 MBPS Fast Ethernet (1 GB Fast Ethernet ideal)

System Requirements

The following is a summary of the minimum recommended hardware and software requirements for the various *doc-link* components. *doc-link* version 3.1 may run on hardware below the outline suggested below but is not supported by Altec.

Server Requirements

Application server, database, services and/or remote/web/mobile server components can be installed on the same server or distributed across multiple servers.

Application Server (COM+ Components)

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012, 2012 R2
- 2 GHz dual core or dual processor minimum
- 4 GB RAM *
- Net Framework v 4.5
- Cannot be installed on a domain controller

***Note:** If application server components, database, services and remote/web server components are installed on the same server, the following is required:

- Windows Server 2008 – 8 GB RAM
- Windows Server 2012 – 8 GB RAM

Database Server

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012, 2012 R2
- SQL Server 2008, 2012 or 2014. Refer to SQL Server documentation for minimum requirements. SQL should be configured to use both SQL Server and Windows authentication and SQL compatibility level set to SQL 2005 or higher.*
- 4 GHz dual core or dual processor minimum
- 4 GB RAM **
- Hard drive space requirements for the database vary depending on the number of documents you are storing and where you plan to store your documents. If you plan to store your documents in the file system, you will not require space for documents in the database.

***Note:** SQL Server Express Edition is NOT supported with *doc-link*.

****Note:** If application server components, database, services and remote/web server components are installed on the same server the following is required:

- Windows Server 2008 – 8 GB RAM
- Windows Server 2012 – 8 GB RAM

doc-link Remote Server (for *doc-link* Smart Client)

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012, 2012 R2
- 2 GHz dual core or dual processor minimum
- 4 GB RAM *
- Internet Information Services (IIS) ASP.Net and SMTP must be installed.
- .Net Framework 4.0
- .Net Framework 3.5.1 Features
- Cannot be installed on a domain controller

***Note:** If application server components, database, services and/or remote/web/mobile server components are installed on the same server the following is required:

- Windows Server 2008 – 8 GB RAM
- Windows Server 2012 – 8 GB RAM

Services — ERM (Enterprise Report Management), Indexing, Output Manager, Import, Barcode and Event Manager

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012, 2012 R2
- 2 GHz dual core or dual processor minimum
- 4 GB RAM *
- Net Framework 4.0
- Output Manager requirements:
  - Supported fax application if routing via fax:
    - ☐ Windows Fax and Scan
    - ☐ NetsatisFAXtion 7.5+
    - ☐ RightFax 9.3+
    - ☐ VSI-FAX 6.1+
    - ☐ Internet Information Services (IIS) SMTP Service must be installed to route via email.
- Cannot be installed on a domain controller

***Note:** If application server components, database, services and remote/web server components are installed on the same server the following is required:

- Windows Server 2008 – 8 GB RAM
- Windows Server 2012 – 8 GB RAM

doc-link Web Server Components

- Installation on a public-facing web server
- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012, 2012 R2
- 2 GHz dual core or dual processor minimum
- 4 GB RAM *
- Internet Information Services (IIS) SMTP Service must be installed.
- .Net Framework v 4.5
- Connectivity to the *doc-link* Smart Client server
- Cannot be installed on a domain controller
- Secured with SSL recommended
  - Must have an SSL certificate from a well-known provider

doc-link Mobile Server Components

- Installation on a public-facing web server
- Windows Server 2008 R2 or Windows Server 2012 and 2012 R2
- 2 GHz dual core or dual processor minimum
- 4 GB RAM *
- Internet Information Services (IIS)
- .Net Framework v 4.5
- Connectivity to the *doc-link* Smart Client server
- Cannot be installed on a domain controller
- Secured with SSL recommended
- Must have an SSL certificate from a well-known provider

***Note:** If application server components, database, services and remote/web server components are installed on the same server the following is required:

- Windows Server 2008 – 8 GB RAM
- Windows Server 2012 – 8 GB RAM

Client Workstation Requirements

doc-link Smart Client

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012 and 2012 R2, Windows 8 and 8.1 Pro (including Surface Pro with Intel-based processors), Windows 7, Windows Vista
- 1.6 GHz dual core or 2 GHz single core or faster processor
- 1 GB RAM above operating system requirements *
- 200 MB hard disk space to run the client
- Dual monitor setup recommended for client installations designated for side-by-side integrations.
    - Recommended that Windows 7 Display settings (Control Panel > Appearance and Personalization > Display) are only set to 100% and no larger.
- Recommended screen resolution (for distribution stamp coding):
    - 1024x728 or 1080x1224
- .Net Framework v 4.5
- *doc-link* users currently need to have a domain account with at least Local Power User rights and sufficient privileges to download and install the *doc-link* Application Launcher.
- *doc-link* users in a terminal or Citrix environment need to have at least "write" permissions to edit installation directories and writing to error logs.

***Note:** 4 GB RAM recommended on Windows Server 2012, Windows Server 2008, Windows 8, Windows 7, and Windows Vista.

Desktop Applications (*doc-link* Administrator, Decollator, Barcode)

- Both 32-bit and 64-bit editions of Windows Server 2008, 2008 R2 or Windows Server 2012 and 2012 R2, Windows 8 and 8.1 Pro (including Surface Pro with Intel-based processors), Windows 7, Windows Vista
- 1.6 GHz dual core or 2 GHz single core or faster processor
- 1 GB RAM above operating system requirements*
- 200 MB hard disk space to run the client
- Dual monitor setup recommended for client installations designated for side-by-side integrations.
    - Recommended that Windows 7 Display settings (Control Panel > Appearance and Personalization > Display) are only set to 100% and no larger.
- .Net Framework v 4.5
- *doc-link* users currently need to have a domain

doc-link Web Client

- Internet Explorer 10.0 or higher Chrome, Firefox and Safari (all enabled to accept cookies and allow pop-ups)
- Adobe Reader 5.0 or higher

Scan-link Station

Required only if Scan-link application is installed

- Windows 7, Windows 8 and 8.1, Windows Vista
- 1 GHz or faster processor
- 2 GB RAM recommended
- Minimum of 10 GB of available disk space for scanning
- 19" Monitor (recommended)
- .Net Framework v 4.5

Additional Considerations

Virtualized Environments

- Support is provided for *doc-link* in a virtualized environment such as VMWare as long as *doc-link* is running on a supported server/operating system.

- The virtualized environment must meet the minimum hardware requirements for *doc-link*.
- Support is exclusive of any third-party applications that we integrate with. Please check the third party vendor for its virtualization support.

Localization/Regional Settings

Summary of how the localization/regional settings are handled in *doc-link*:

- DB Server: This can be in any format as the Application Server and Client regional settings. Dates are stored as serialized strings and numbers (floats, number, decimal, etc) are stored as actual values. All values are stored the same regardless of regional settings.
- Application Server for Smart Client IIS components: There needs to be an Application Server for each of the client regional settings so as to enable the end users to be able to perform a search using the correct respective separator. However, you will find that there are some formats that are compatible (i.e. English (Singapore) and English (United Kingdom).
- Client Machine (i.e. Local PC/Citrix Servers): The client machines will display the data based on the regional settings for the user's profile.

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