Dokmee Capture

1. Customer scans their documents into Dokmee Capture. There are 3 types of documents that will be scanned in under different Capture profiles based on the index values the need to capture.
2. Documents will be renamed based on index values (account number – Last name, First name and month/year (ie **A123 4567-8910 Doe\_John 05.2018**).
3. Documents will have a select list with the values “new”, “uploaded” and “complete”
4. Dokmee Capture will execute two exports to Windows File Explorer and Dokmee DMS. Documents are in PDF format Document status out of Capture is listed as “New”
5. Folder structure will be exported based on index values

Dokmee DMS

1. All documents imported into DMS according to folder structure defined in Dokmee Capture.
2. Documents Imported into Dokmee DMS will have “Status” as “New” until updated.

Windows File Explorer

1. All files are sent to Windows File Explorer. They will be separated into 3 different folders based on which type of the 3 documents they are.
2. Folders A and B are uploaded, while folder C will need to be manually uploaded by the customer.

\*Requesting Client Works API for upload access

1. Upon confirmation of a successful upload the index value status within Dokmee DMS will be updated to “Uploaded”
2. Once the manual upload process takes place (client uploading manually to the web application) they will drop the documents into a monitored folder that will:
3. Import documents into Dokmee DMS
4. Update Index Status to “Uploaded”

Custom Application (web application)

\*Customer Forms Image

**Web Application**

Description: Will use web application to update multiple index values simultaneously. Only index value intended to be updated is “Document Status” which will be a select list. Native ability of Dokmee DMS is to update index values within individual documents so they cannot currently update multiple index values simultaneously. Web application connection will be made via Dokmee DMS Connector. All documents within the application will come from a folder designated within DMS (To be determined).

Login credentials connected to DMS login (Initially intended for one user but want to have the option for multiple logins)

**Abilities available through web application**

Ability to check one, multiple or a “select all” document.

Hovering over “EXT” icon renders an image preview. Double clicking anywhere on within the fields of a single document will pull a full size image of the document (If able to be rendered in a typical browser) in a separate HTML page.

Index values displayed will be pulled from document within Dokmee DMS.

Document Status field will be a select list with the options – New, Uploaded, Complete

Clicking the “Update” icon in top corner will just update index values within application.

Clicking the “Complete” icon will remove the documents from the view of the application and move to a designated folder within Dokmee DMS (To be determined)

No functionality on center logo.File count to be displayed in top left corner.



