

## Frequently Asked Questions\_2024-05-20

Category	Question	Answer
Document Upload	When a PDF file is uploaded to eCharta, is the file compressed as part of the process?	Yes, all PDF files are compressed to save space as well as optimized for Fast Web View. Fast Web View allows a large PDF to open and be viewable after the first few pages have been transferred while the remaining pages continue to transfer. This means you don't have to wait for the last page to be sent (securely) across the internet to your browser before the PDF is viewable.
Searching	Does eCharta use a folder tree structure?	<p>Absolutely not! eCharta's frees an organization from using rigid folder tree structures. Businesses no longer need to think in terms such as creating cabinets, drawers and folders to store documents. Or creating Root folder, sub-folders, sub-sub-folder. Search Results are returned based on your organization's needs.</p> <p>For more information, click on this link to watch the video "Think Outside the Box" at <a href="#">_____</a></p>
Document Management	Can I add searchable comments or notes to a document?	Although you cannot annotate direct comments within the PDF or Native file, you can use the Note function to add a textual message associated to the document that appears in a pop-up window when the Notes icon is clicked on. The content of the note will be included when performing full-text searching.
Document Management Storage	What types of documents can be stored in eCharta?	<p>Any computer file or scanned image can be stored in eCharta, although only certain file types will have an additional PDF document created. As example, Word, Excel, and PowerPoint will generat an additional PDF file. Files which are not printable such as .WAV or .MPG format will not.</p> <p>Native files other than PDF stored in eCharta will be need a compatible application or reader for the file format installed on the local computer. PDF files are viewed using the built-in eCharta image viewer.</p>

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Technical	What Internet Browsers will work with eCharta?	<p>Current and previous two major releases of:</p> <ul style="list-style-type: none"> <li>•Microsoft Edge</li> <li>•Firefox</li> <li>•Chrome</li> <li>•Iridium</li> <li>•Chrome</li> <li>•Internet Explorer</li> </ul> <p>Recommend having a PDF viewer such as Adobe Reader loaded on the user's client machine</p>
Storage Security	Are documents stored in a proprietary format in eCharta?	Documents are stored in a binary format within SQL database. However, the document's content remains unchanged when they are copied to the eCharta database from their original format. Computer-generated documents are stored in their native format in addition to being stored as standard PDF.
Technical	What operating systems can eCharta support?	eCharta is a secure cloud-based solution for your business's document storage, search, and retrieval needs. It is operating system agnostic, requiring only an internet browser to function. However, for certain file types, such as CAD drawing files, you will need the appropriate application or reader installed on your client machine to view the native file after download.
Security	How do I control access to my documents?	eCharta utilizes a powerful security methodology for users and groups that allows an administrator to set user permissions based on the user login for nearly every function of the program. Automatic log-off after a defined period of inactivity further assures the confidentiality of your stored documents.

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Document Management	Can additional pages be added to an existing document?	No, eCharta maintains the integrity of documents by not allowing any modifications, including adding or deleting pages, to the content within a file (PDF or other format). To make changes, you need to first download the document from the eCharta system to your client machine and modify it offline. Once the changes are made, you can upload the modified document as a new file, while the original document remains intact within the eCharta system. This ensures compliance with regulatory requirements by preserving the original document unchanged.
Document Management	Can I merge documents in eCharta?	No, eCharta stores all files as single documents which and, by design, does not allow for editing or modification. Any editing or merging of documents can be performed by first downloading the required document, performing the desired edit, and then uploading the changed file as a new document with a different revision or version number.
Document Management	How do I get my documents back if I decide to cancel the service?	Routine download via FTP or Physical Media (chargeable) Final dispensation of documents on physical media We keep the documents and metadata for 90 days after discontinuation of service and then purge.
Organizing Documents Document Upload	How do I load my existing documents into eCharta?	Singularly or in bulk (Finder File or interactive keying) Paid service to help code and upload
Organizing Documents Document Upload	How do I load my existing documents into eCharta?	Singularly or in bulk (Finder File or interactive keying) Paid service to help code and upload
Value	How will eCharta immediately start measurably reducing my monthly costs and provide measurable ROI?	The time when you step up from manual process to eCharta for your documents, you yourself feel the ROI in terms of time, management, revenue etc.
Value	What return on investment (ROI) can I expect?	The time when you step up from manual process to eCharta for your documents, you yourself feel the ROI in terms of time, management, revenue etc.

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Storage	Are there any limitation on a document's physical size (i.e. number of pages, dimensions, etc.)?	There are no physical restrictions to the physical size or dimensions of any document or file. However, files with large number of pages or content density will effect the speed at which the data will load across the internet. The ability of eCharta to generate PDF files with Fast Web View aids in faster access to the pages when a document is first opened.
Storage	What file types can be stored in eCharta?	There are no restrictions on the file types you can upload and store on eCharta. However, only certain file types can be translated to PDF format. For a complete list of file extensions, please see the FAQ's about Native File Types
Storage	Is there any limitation on the number of documents that can be stored?	There are three subscription plans, each with a set number of document pages ranging from a half million to 5 million pages storage. eCharta is extensible to hold an unlimted amount of files and pages if a businesses demands exceed the limits offered in any of the three packages.
Security	Can anyone view or edit eCharta documents using Windows Explorer or any other file manager?	This answer is no. For security and performance, all documents are stored in the eCharta database and cannot be seen as files on a hard drive, even by internal DCPi staff. The documents are only accessable through the eCharta system. The documents are stored in a seperate datbase as binary data with a system gernerated key for identity. All information about the document is stored in a seperate independent database. When a document is searched for and requested to be opened, only then does the eChatra system reconstitutes the raw binary data back into a the document for viewing or download.

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<b>Document Management</b>	Can I add additional pages to an existing document?	When you upload a document to eCharta, it becomes permanently set to not allow further editing within eCharta. Documents in eCharta are permanent record. Provided you have the correct security, you can download the document to your local machine and use the applicable editing software to modify the document and then upload the new version to eCharta.
<b>Document Upload</b>	When a PDF file is uploaded to eCharta, is the file compressed as part of the process?	Yes, all PDF files are compressed to save space as well as optimized for Fast Web View. Fast Web View allows a large PDF to open and be viewable after the first few pages have been transferred while the remaining pages continue to transfer. This means you don't have to wait for the last page to be sent (securely) across the internet to your browser before the PDF is viewable.
<b>Accessing eCharta</b>	Can users' access documents in eCharta via mobile devices such as smart phones and tablets?	Yes, as long as the device has internet access, users can use all the normal document search and retrieval functions in eCharta. However, for more complex tasks such as coding and uploading large collections of documents, using a larger screen like a PC or workstation is more suitable.
<b>Extensibility</b>	Can eCharta be set-up that I can send a programatic request for documents from one of my internal programs and have the documents requested display on my computer without having to login to my eCharta account?	Yes, depending upon the application in most cases we can work with your Information Technology Department to develop secure web services customized to your business's requirements

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Technical	Does eCharta compress images?	Yes, during the OCR (Optical Character Recognition) process, eCharta uses state-of-the-art industry compression techniques. The resulting compression allows for faster streaming of documents and less space occupied in storage. Additionally, during the OCR processing step, PDF documents are optimized for "Fast Web View." This step allows the first page of a document to display and be visible, while any remaining pages continue to load to the user's machine in the background. Fast Web View means that the user doesn't have to wait for the last page of the document to transfer before the first page is visible.
Reports	Can I generate reports with eCharta?	Yes, eCharta allows authorized users to generate user activity and system usage reports. Additionally, metadata from document search query result lists can be exported to Microsoft Excel, CSV, and PDF for additional reporting flexibility.
Accessing eCharta	Can access to users be restricted to only logging in from the office or specifically designated locations?	Yes, eCharta allows the Company Administrator to set a range of acceptable IP addresses, restricting select users to log in only from computers within the specified network. This restriction can be assigned on a user-by-user basis.
Document Upload	Can eCharta convert Microsoft Word, Excel or HTML documents into PDF documents?	Yes, eCharta automatically convert any printable document into a PDF document.

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<b>Security Compliance</b>	Does eCharta maintain an audit trail on every document?	<p>Yes, eCharta keeps a comprehensive audit trail and tracks every action taken on a document. This includes:</p> <p>a.) Changes to document metadata, including what the change was and a record of all prior conditions.</p> <p>b.) The time, date, and user making the change.</p> <p>c.) Events such as viewing, downloading, uploading, or emailing a document, whether individually or as part of a document set.</p> <p>The ability for users to generate audit trail reports is set by the Company or Group Administrators.</p>
<b>Organizing Documents</b>	Can I sort and group my documents?	<p>Yes, if a user has the correct system access level, all metadata in a search results set can be downloaded into an Excel or comma separated value file format. The information for each document in the search result set can then be reordered by sorting or filtering by field.</p> <p>Additionally, search results list can be fields by either ascending or descending order, and group and sub-group the contents of a folder or query list by index fields.</p>
<b>Accessing eCharta</b>	Can more than one user search for and view a document at the same time?	<p>Yes, provided each user has the appropriate Portfolio access rights, multiple users can add new documents, search for, and view documents in a Portfolio simultaneously. The integrity of the original document will not be altered.</p>

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Searching	Can searchable comments be associated to individual documents?	<p>Yes, through the use of the Notes feature, eCharta users who have the assigned privalage, can attach comments to the document. These notes can be included or excluded when utilizing the full-text search.</p> <p>Since eCharta doesn't allow the integrity of the original document to be altered, the attached notes are stored independent of the docuemnt they are associated with. The user name and time stamp of when the note was added is caputred and displayed in the Notes field.</p>
Compliance	Is eCharta compliant with HIPAA, Sarbanes-Oxley, SEC and GLB regulations for document security, audit trail and retention?	<p>Yes. eCharta complies with all US government regulations for document and record security, and retention. In fact, our compliance with electronic document management makes us a very popular solution for clients in the FINANCIAL SERVICES, HEALTHCARE and LEGAL industries.</p>