Our *DMS@Home* Product

The Product

A suite of simple tools that
- each do one thing well,
- interoperate with each other, and
- interoperate with other tools that people use for remote work such as Slack and Xero.

Not
- A monolith like SharePoint
- Not scan based like Kofax[1]. Most documents are digital today. Modern mobile cameras are more than adequate for the few paper documents we need to digitise at home.

Functionality

Can we find and implement the 10% of features that meet the needs of 90% of customers? This is the intersection of what customers need, what we can build and what customers will pay for.

We are looking for functionality we can demonstrate in months.

1. Regulatory compliance[2]
   a. People pay for this.
   b. Some of it is easy
        i. Checking documents for compliance
        ii. Keeping audit trails
2. Archiving
3. Document search
4. Document control
5. Error detection and correction
6. Adding value to documents
   a. Meta-data to academic articles
   b. Basic DRM

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[1] Stu Brookes: @chris I'd play devil's advocate on the Nuance/Kofax thing… If the world goes "we can live without printing" and volumes reduce, and the increase of digital capture increases, then I'd suggest they are very well placed with AutoStore, OpenForms and the Mobile Capture product - not to mention Kofax's automation software. Equitrac might go away, but they've got ready made products for digital transformation. I do think this is an area that we should look at closer potentially.

[2] See Kofax Compliance in the Competitors section. People already pay for this.

Design Principles

1. Works like paper. We don't give up any of the benefits of paper as we move to digital. There are many advantages to paper workflows. Google Docs is a great collaboration tool but it is not a workflow tool.
   a. Document-centric workflows. Just like paper-based workflows
      i. Paper documents for paper-based workflows
      ii. PDFs for digital workflows
   b. User owns her documents. We can sign everything and allow ownership to be checked.
   c. Users can choose who they share with.
   d. There is no central repository like Google Docs.
2. Need all the digital advantages
   a. Search
   b. Archiving
   c. Digital signatures
   d. Audit trail
   e. Extraction of useful information
3. [Works from home](). Everything we do will work from home from day 1.
   a. This will be a fully distributed system.
   b. Being document-centric:
      i. user has copies of documents on her device
      ii. Do we need edge nodes in people's homes? In businesses? What is the high level network topology for WFH?

Use Cases

We need to think about how to implement our functionality so that it is fully-distributed.

1. **Document routing.**
   a. Everyone in company **P** is working from home.
   b. Customer emails payment for a product to **P.**
   c. We need an agent that listens on the company **P** email account (possibly multiple accounts) extracts attached documents, classifies them and routes to the appropriate person (maybe we could make the role-based rather than person-based. Roles could be accountant, HR etc and people could take one or more roles)
   d. Our product keeps a database of documents and their classifications
   e. Accountants working from home get a notification (maybe a gmail) of the documents
   f. An accountant **A** pulls a document **D** from the database
   g. **A** works on the document
   h. **A** updates the document database with progress on **D**.

i. **A** optionally updates **D**.
    2. **Contract management**. See [webdox](#) for ideas.
    3. **HR documents**. Is there anything we would do here other than inter-operate with Bamboo?
    4. **[Doctor's](#) waiting room** I filled out paper forms in all my recent visits to doctors and hospitals. See [managing workflow](#). What if we
        a. automated form creation
        b. made a web page that patients could log into to get the form and our mobile app
        c. digitally signed and archived the filled forms
        d. made the filled forms searchable by the medical practice
        e. made our system interoperable with the EHR companies
    5. Tagging academic PDFs with metada

What to Build First

Put your choices here. Please explain why it is useful and give estimated time to build
    1. Form filler
        a. Need this for WFH
        b. Back-end: < 1 week for basic.
    2. Invoice extractor
        a. 97% of PaperCut invoices and payments are PDF attachments to emails
        b. Back-end: < 1 month
    3. [Audit trail](#)
    4. Kofax-style document router.
        a. How about a distributed document router for WFH?

References

    1. [Magic Quadrant for Content Services Platforms](#)
    2. https://en.wikipedia.org/wiki/Content_management_system
    3. https://en.wikipedia.org/wiki/Document_management_system

Competitors

[Kofax](#)

Security Manage, secure, and govern your documents through unified printing, scanning, and automated workflows.
Productivity Ensure documents get to all the right people at the right time, every time, through the right workflows and processes.
Compliance Maintain a record of print and capture document workflows for tracking and auditing.

[DocuShare](#)

Upload and catalog content in seconds with powerful information capture features
Categorize, store, organize and manage content throughout its lifecycle
Collaborate on documents to help teams work more efficiently
Add annotations such as comments and highlights or redact sensitive information
Automate key processes such as approval or review requests
Prottect sensitive data with access restrictions, auditable tracking, reporting and retention
Find content fast with powerful search capabilities

Potential Partners

1. Bamboo
2. Xerox
3. https://www.webdox.cl/ebooks
4. [Workflow management software](#)
5. [Practice management software](#)