DOCSVAULT

Docsvault is full of features that can help small businesses and large enterprises with their document management and collaboration. The feature matrix below displays Docsvault's abilities for its Small Business, Enterprise & Ultimate Editions.

O - Optional	Small Business	Enterprise	Ultimate
Document Management			
Create & Edit Word, Excel & PDF document within Docsvault	-	✓	✓
Preview contents of all common file formats (Word, Excel, Emails, Tiff, PDF, Images & Drawings) without their native applications	-	✓	✓
Drag and drop files to Docsvault using floating desktop Drop Folder.	✓	✓	✓
Drag and Drop files from Docsvault to desktop, Outlook and any other browser-based application.	✓	✓	✓
Version Control System	✓	✓	✓
Simple Workflow With Email Notifications	✓	✓	✓
Custom Document Profiling (Index Fields)	✓	✓	✓
Concurrent Access with Overwrite Protection (Checkin/Checkout Feature)	✓	✓	✓
Document Notes (With User and Time Log)	✓	✓	✓
Schedule Document Tasks and Reminders	✓	✓	✓
Customizable Document Statuses like Draft, Revision, Published, etc. with associated flags, security, and ownership settings	✓	✓	✓
Set Relations Between Documents	✓	✓	✓
Document Links - Virtually Place a Document in Multiple Locations	✓	✓	✓
Folder Sections with Colored Tabs	✓	✓	✓
Folder Templates (Predefined Folder Structures)	✓	✓	✓
File Templates (Predefined set of draft documents for later one-click creation of repetitive documents)	✓	✓	✓
Customizable document IDs to reference files in the repository with your own ID format	✓	✓	✓
Identify and retrieve files using Unique System IDs assigned automatically by Docsvault	✓	✓	✓
Filename template for consistent file naming	-	✓	✓
Save and reuse frequently used filename and indexing profiles	-	✓	✓
Compare Text, Word and Excel documents with one click	-	✓	✓
Email Templates (Predefine set of draft emails for one-click creation of repetitive emails)	-	✓	✓
Address book (Store and manage contact information for later use)	-	✓	✓
Tools to find Duplicate Files in your repository	-	✓	✓
Copy a Desktop Client based shortcut link of a file or folder which can then be pasted in other documents	-	✓	✓

	Small Business	Enterprise	Ultimate
O - Optional			
Share documents with other users adding automated expiry date and simplified access rights	-	✓	✓
Microsoft Office Integration	✓	✓	✓
Microsoft Office Word, Excel, and PowerPoint Integration			
Outlook Integration (Save Emails/Attachments. Attach Documents to Emails)			
Option to override the 'Save' button in Word, Excel and PowerPoint to save directly to Docsvault			
Check for duplicate emails when saving to Docsvault	-	✓	✓
Option to prompt user to save emails to Docsvault when sending emails out			
Add custom Footer Stamps to Word & Excel files			
Create PDF or PDF-A copies from Add-ins			
Custom Reporting	-	✓	✓
Create your own reports and execute them with one click anytime for real-time results			
Users can keep their custom reports private or share it will everyone in the system			
Export out report results in multiple formats like PDF, Excel, Print, Email, etc.			
Online Document Management/Web File Access	-	✓	✓
Access documents from anywhere using web browsers			
Available to PC, MAC, Linux and mobile device users			
Create public link to share any document version with external users			
Share files and folders right from Docsvault via email with password-protection, expiration dates and optional download permission			
Get files from anyone using Document Request Links directly in Docsvault. Outside users simply drag and drop files in web browser to send you files.			
Mobile Apps	-	✓	✓
Mobile Apps for iOS and Android smartphones & tablets			
Secure encrypted connection to your DV Server			
Search, create folders, upload new documents captured using your camera, add to favorite, edit notes and description, change document profiles & document status			
Get Notifications of new workflow tasks			
Review and approve workflow task and move then forward			

	Small Business	Enterprise	Ultimate
O - Optional			
Take ownership of workflow tasks or delegate tasks with simple taps			
Document Profiling & Indexing (Metadata)			
Create your own custom index fields and profile documents with relevant metadata for different types of documents in your repository	✓	✓	✓
Index fields can be free text input, predefined static lists, dates, numbers, auto incremental, etc.	✓	✓	✓
Allow choice of profiles or enforce consistency by mandating use of specified profile under certain locations	✓	✓	✓
Apply predefined/custom validation rules for checking entered values (ex: zip code, phone#, IDs, etc.)	✓	✓	✓
Automatically name documents, add description and notes based on index values during import	✓	✓	✓
Auto populate dynamic index values such as current user, date, day, time, etc.	✓	✓	✓
Set indexes to inherit values automatically from their parent folder	✓	✓	✓
Filing Template with Strict Structure and restricted modification	✓	✓	✓
Relate Index Fields with each other	✓	✓	✓
Set auto relation between documents on the basis of same index values	-	✓	✓
Auto document filing based on entered index values	-	✓	✓
Records Retention	–	✓	✓
Create multiple retention policies for different documents			
Manage both physical records & digital files in one system			
Manage the circulation of physical records			
Auto retention can be applied based on document profile and date index field in them & also based on the document's created date in the system			
Manually apply retention to a large number of documents in one go			
Full audit trail and traceability for compliance			
Archive and Delete Policies	X	✓	✓
Set up multiple custom archive or deletion policies			
Automatically trigger policies based on index fields or creation/modification dates			
Archive or restore document manually on demand			
Archive Policy Holds to prevent automatic removal			
Search in archive options			

	Small Business	Enterprise	Ultimate
O - Optional			
Security and Administration			
Fine Grained Access Control (Users and Groups)	✓	✓	✓
System Level Rights For Different System Activities	✓	✓	✓
Prevent users from exporting Documents out of the system	✓	✓	✓
User Based and Folder Based Ownership Overrides	✓	✓	✓
Active Directory Integration for user authentication	✓	✓	✓
Disable user logins after n number of failed login attempts for security	✓	✓	✓
FIPS-Compliant Deployment	✓	✓	✓
Reports & Charts (view and export in different file formats)	-	✓	✓
Maintain parallel repository in simple windows folders	-	✓	✓
Importing Static Index values from predefined csv or xml file list	✓	✓	✓
Export repository with metadata in various formats	-	✓	✓
Export Document Profile values as csv, xls, xml, etc	-	✓	✓
Scanning and Capture			
Built-in Advanced Scanning Tools	✓	✓	✓
Document Assembly Before Imports (split, merge, rescan, drag and drop pages, etc.)	✓	✓	✓
Multiple Scan Profiles To Accomplish Different Scan Jobs	✓	✓	✓
Scan from any TWAIN-compliant scanner or any folder	✓	✓	✓
Rubber Band OCR for quick profiling	✓	✓	✓
Automatic Document Separation (Barcode, Blank Page, etc.)	✓	✓	✓
Watch Folders or Hot Folders for auto imports from specified location	✓	✓	✓
Save documents as PDF Files from any application)	✓	✓	✓
Profile-based Auto Filing of scanned documents	-	✓	✓
Search and Retrieval			
Comprehensive Search (Simple and Advanced)	✓	✓	✓
Profile Search: Metadata Driven File Search	✓	✓	✓
Full-text Indexing For Searching Within File Contents with support for Boolean, Proximity Search and Inflectional Search	✓	✓	✓
Saved Searches (Public and Private)	✓	✓	✓
Refine Searches To Narrow Down Search Result	✓	✓	✓
Export Search results in different file formats	✓	✓	✓
Smart Search: Access Docsvault files/folders from any 3rd party application using a simple 'hotkey' creating virtual integration	-	✓	✓
PDF Manipulation			
Integrated PDF Manipulation (PDF Editor)	✓	✓	✓

	Small Business	Enterprise	Ultimate
O - Optional			
Correct PDFs with features like redact, erase, edge cleanup, straighten crooked pages, adjust clarity and much more (PDF Correction Tools)	✓	✓	✓
Assemble PDFs (Append, Reorder, Split, Crop, Extract, etc.)	✓	✓	✓
Merge multiple PDFs to create a new file	✓	✓	✓
Annotate PDFs (Highlight, Notes, Draw, Type, etc.)	✓	✓	✓
Edit PDFs (Change, Move or Delete Text & Images)	✓	✓	✓
Add watermarks, bates numbering, barcode and e-signature. Import & export comments & retrieve Adobe Acrobat Forms data	✓	✓	✓
Scan and append new pages to any PDF	✓	✓	✓
Convert TIFF files to PDFs automatically	✓	✓	✓
Instantly create a PDF copy of any Word or Excel document	✓	✓	✓
Save PDFs directly from Adobe Acrobat Reader/Pro into Docsvault	✓	✓	✓
Audit & Notification			
Folder and File Activity Monitoring	✓	✓	✓
Advanced Audit Trial (logs all activities along with from - to information on events)	-	✓	✓
Set instant or periodic Email Alerts for document events for yourself or your team	✓	✓	✓
Query for all activities by any user or under specified location	✓	✓	✓
Export reports in different file formats	✓	✓	✓
Document Tasks			
Route document and assign task to other users	✓	✓	✓
Allot or forward task to individual or a group	✓	✓	✓
Notifications and schedule reminders via email and/or popup alerts	✓	✓	✓
Review the entire tasks workflow (history of task)	✓	✓	✓
Add task-related notes	✓	✓	✓
Assign Personal task and reminders	✓	✓	✓
Export Task lists in different file formats	✓	✓	✓
Access entire Task Manager using web browser	-	✓	✓
Automated Electronic Workflows	-	✓	✓
Build workflows logic graphically to automate business processes without coding			
Route workflow automatically to dynamic or predefined users			
Prompt workflow users for any mandatory information or enter comments before moving the workflow further			
Export workflow documents and their profile metadata automatically to a predefined location			
Get email alerts for Workflow events and exceptions for prompt action and supervision			
Full workflow events logging and traceability			

	Small Business	Enterprise	Ultimate
O - Optional			
Digitally sign documents as part of a workflow			
Manage revision and audits of QMS documents			
Reports for users and workflow managers to monitor daily task performance, participation, overall workflow performance, etc.			
Email Reminder Jobs	-	✓	✓
Set automated email jobs to send out personalized emails to yourself or customers as a reminder for time sensitive documents			
Reminders can be consolidated in one email if sent to a single recipient avoiding separate individual emails for all qualified documents			
Analytics Tools	-	✓	✓
Comprehensive User/Group Access/Security Audit Module			
Dynamic Folder Usage Report			
OCR Add-On	O	O	✓
Optical Character Recognition			
Scan and Create Searchable PDF Files			
Create Searchable PDF files from Imported PDFs			
Administrative Reporting & Control Options for OCR Process			
OCR Legacy TIFF Files and Convert Them to Searchable PDFs			
Advanced Capture Add-On	-	O	✓
Capture values from scanned documents using Barcodes and Zone OCR			
Automatically name documents and set filing rules based on captured index values			
Advanced Profiles Add-On	O	O	✓
Use Data in External Applications Like CRM, Accounting, ERP, etc. to Fill Up Profile Values In Docsvault			
Auto Fill Dependent Index Values Using Custom Queries To External Databases			
Create Conditional Value Lists Depending On Values Chosen For Previous Indexes			
Barcode Reader Add-on	-	O	✓
Reads barcodes on documents for indexing and naming them. Can break down multi-valued barcodes with delimiters and map them with document profile indexes or auto naming			
Advanced Import Add-On	-	O	✓
Use index values in CSV files to automatically name documents, profile them and file them in the right location using filing rules. CSV with ANSI, UTF-8 & UTF-16 encoding are supported.			

	Small Business	Enterprise	Ultimate
O - Optional			
Extract metadata from email files (.eml & .msg format) and map it to index field within Docsvault			
API Add-On	-	*O*	✓
Integrate with any programmable business application using Docsvault's REST based APIs			
Email Automation Add-on	-	*O*	✓
Email Capture: Capture desired emails from any email server using capture rules			
Email Archive: Store, organize and track email communications and attachments for compliance			
Digital Signature Add-on	-	*O*	✓
Sign PDF files using digital signatures to verify your identity			
Certify documents to assure recipients of its contents			
Prevent tampering of documents by automatically invalidating signatures if contents are altered			
Set further restrictions allowing or disallowing others to make various changes			
Get approval signatures from multiple people to complete a document workflow electronically			
Collect in person signatures from non Docsvault users in web interface			
Request signatures from partners and customers (non-Docsvault users)			
Signers can easily sign documents from anywhere and from any device using a simple web browser			
Signatures can be requested for multiple documents and from multiple people in sequence in one go			
Requesters can be notified of the progress with automated emails or they can monitor the progress of each request from within Docsvault			
Web eForms Add-on	-	*O*	✓
Simple Drag and Drop HTML Form Builder with custom themes			
Simple arithmetic calculation using any numeric field			
Formula Table control for simple expense reports, orders and other tables with formulas			
Use Docsvault profile index field onto your eForms			
Create Field Rules to show/hide fields and set values based on the selection/values of other fields			
Create dynamic Word, Excel and PDF documents from templates based on captured data			
Captured data can be used to index the document created, name it dynamically and automatically select its filing location			
Keep an accurate log of data captured & Analyze captured data using various criteria			
Trigger automatic workflows on form submissions			

	Small Business	Enterprise	Ultimate
O - Optional			
Set access security & alert appropriate users on form submissions			
Create customized reports based on form submission entries			
Interface and Usability			
Open Multiple Locations in Different Tabs	✓	✓	✓
Details View With Sorting and Filters	✓	✓	✓
Customizable Columns (Display Document Index Values)	✓	✓	✓
Thumbnail View With Variable Thumbnail Sizes	✓	✓	✓
Per Folder / Per User View Settings	✓	✓	✓
Drag & Drop / Copy & Paste Simplicity	✓	✓	✓
Customizable Folder Icons (Choose From a List or Import Your Own)	✓	✓	✓
Windows Explorer Like Simple Interface	✓	✓	✓
Previous and Next buttons to navigate through recent locations	✓	✓	✓
Memory for recently used search terms, folders, files etc.	✓	✓	✓
Email any document version instantly with Docsvault Quick Email	✓	✓	✓
Export file lists in xml, csv, xls, xlsx, and pdf format	✓	✓	✓
Search option in Navigation Dialog to quickly locate the folder	✓	✓	✓
My Workspace work corner to quickly access user specific	✓	✓	✓
Task Calendar to keep track of active and overdue workflow, personal and assigned tasks.	✓	✓	✓
Centralized Management of User Settings	-	✓	✓
Technical			
Automated Full and Incremental Backups (*if SQL server is installed by Docsvault*)	✓	✓	✓
Broadcasting and Server side event Alerts	✓	✓	✓
Server-side Management Tools	✓	✓	✓
Service Availability Monitoring	✓	✓	✓
Database: Microsoft SQL Server 2014 or above with full text indexing and filestream support. (The free SQL 2014 edition is included by default)	✓	✓	✓
Option to choose a databased template during installation: Blank, General, or Legal	✓	✓	✓
IIS Server: 7.x or higher with asp.net support		✓	✓
Type of User Licensing	• Named • Read-Only	• Named • Read-Only • External • Concurrent	• Named • Read-Only • External • Concurrent
Minimum number of users	5	5	5
Maximum number of users	Unlimited	Unlimited	Unlimited