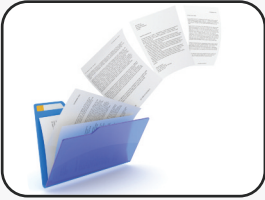# Square 9

# Solution Guide

**Square 9 Softworks** is a leading developer of innovative, business-centric software solutions including the award-winning SmartSearch Enterprise Content Management (ECM) suite. By integrating content management, variable data printing, workflow, and web forms management, Square 9 becomes your single source for eliminating paper based processes while increasing business efficiency.

## Core Product Features

The SmartSearch core ECM suite delivers a highly intuitive foundation for Content Management with powerful tools for effectively managing images and electronic content. The base product suite provides the ability to store, search and manage documents through the included SQL Express database engine (administrators may optionally select an existing instance of SQL 2005 or 2008). Standard features include:

- **Annotations**

  Easily attach a sticky note, highlight, redact, sign or stamp documents while always protecting the integrity of the original record.

- **Audit Trail Reporting**

  Quickly view the history of a record including views, prints, emails, launches and exports to name a few. Document History can be run against a single record, the results of a query or at the Archive level.

- **Bar Code Recognition**

  SmartSearch supports bar code recognition including Code 39,129 and Codabar for the extractions of high value information which can be used for automatically filing your documents.

- **Email Delivery**

  Easily send and distribute your documents from SmartSearch through direct integration with your email client.

- **Email Notification**

  Notify your users when a document arrives so that they can give it their immediate attention.

- **Image Enhancement**

  Improve the quality of your documents quickly and easily with image enhancement. Through batch or ad hoc processes, image enhancement applies de-speckle, de-skew and various other document clean-up tasks to improve OCR capabilities.

- **Image Separation**

  SmartSearch supports bar code, blank-page and page count separation for high speed batch scanning. Using a Windows service, the separation engine monitors inbound documents and performs the pre-configured separation for high speed batch scanning.

- **OCR Assisted Indexing**

  The unique KeyFree Indexing™ feature within SmartSearch makes filing documents just a few clicks away. Hover over a word or phrase and click your mouse to extract information quickly and accurately.

- **Revision Control**

  Revision control maintains a history of your document changes while enforcing business rules for accessing content. Easily determine which users can see versions, make edits and decide what content will be made available for public consumption.

## Optional Modules

With its modular design, SmartSearch offers maximum flexibility in both pricing and configuration by allowing organizations to select only the tools needed for their specific business application. Increase the value of your investment with an array of tools designed to increase document efficiency.

- **GlobalSearch**

  Extend the reach of your ECM platform with web based document delivery. Remote users can search, review, edit or annotate records and even add the power of web based workflow capabilities when used in conjunction with our Work XChange module.

- **GlobalForms**

  Eliminate handwritten, paper based forms within your organization. GlobalForms delivers a complete pallet of tools for easily creating Java based web forms where information can be captured and shared with other applications. Information entered into GlobalForms generates a PDF output where it can be used to trigger a workflow process or simply be archived within SmartSearch.

- **PlanetPress**

  Take unformatted data from a print stream or database and deliver beautifully designed documents to print, email, or fax via our signature solution for variable data printing. Documents created through PlanetPress can be seamlessly fed to SmartSearch to trigger a workflow process or simply for archival.

- **Purchase to Pay**

  Square 9 Purchase to Pay features advanced Enterprise Content Management tools which create an end to end solution for Accounts Payable automation. Purchase to Pay is designed to dramatically reduce the high transactional costs inherent to processing Requisitions, Purchase Orders and Vendor Invoices in a paper based world.

- **Hire to Retire**

  Square 9's Hire to Retire is an innovative solution to eliminate paper intensive Human Resources productivities through a digitized workflow. Hire to Retire is designed as a single web forms solution to streamline the process of employee onboarding plus management of employee requests and personal documentation.

- **QuickBooks Connections**

  QuickBooks Connections is a highly advanced, cost-effective solution designed to streamline and facilitate your accounting processes. QuickBooks Connections provides seamless integration allowing users to create bills, route invoices and distribute documents from SmartSearch in tandem with their QuickBooks® accounting software.

## Optional Modules Continues

- **Content Search**

  Mine for critical data within your documents through the power of content based searching. SmartSearch supports keyword, boolean and phrase based searching with options for fuzzy logic and stemming.

- **Image XChange**

  Call documents within SmartSearch from any business application without integration. By leveraging GDI hooking technology, documents are available from any line of business system including Windows, Web, Java, 5250 or 3270 Terminal Emulator, DOS or UNIX VT100.

- **DataMerge**

  Eliminate the need to enter data into multiple business applications with SmartSearch DataMerge. Information is easily shared between SmartSearch and your line of business application automatically through ODBC or ODMA database integration.

- **Zonal OCR**

  Easily create templates for extracting high value data from standardized forms with this powerful tool for Optical Character Recognition.

- **Tabular Data Control**

  Capture, store and share high value data like the information stored within invoice tables. With tabular data support, line item information can be easily extracted and manipulated for applications like AP/GL coding.

- **XML Transform**

  XML Transform has the ability to format virtually any XML data from third party applications into a format that may be imported directly into SmartSearch.

- **PDF Creator**

  Make document searches more intelligent by turning your scanned images into fully text searchable PDF documents. As an integrated option within Capture Workflow, conversion of your document to PDF format is fully automated.

- **Work XChange**

  Automate the flow of documents throughout your organization with tools to route, review, approve and distribute information. As an optional module within SmartSearch, Work XChange takes a graphical approach to creating and maintaining workflow automation through a highly intuitive drag & drop design tool featuring Workflow Activities.

## The Square 9 Professional Services Group

The Square 9 Professional Services Group can help make your ECM initiative reach its full potential with our full service approach to bringing out the best in SmartSearch. With a focus on the individual needs of the client, the Square 9 Professional Services Group can deliver exactly what you're looking for.

- **Back-file Conversion Services**

  Through Square 9's unsurpassed document conversion services, your organization can focus on its business priorities, free up valuable office space, immediately access and deliver information to your customers, and eliminate the potential for lost, misfiled or damaged documents.

- **Custom Development**

  Looking to integrate SmartSearch into your line of business application or add document access to a custom web portal? Square 9 has the resources and expertise to develop a project of any size. Our development team specializes in Microsoft .Net programming specifically focusing on web service enabled applications.

- **Data Conversion Services**

  Users of legacy ECM systems looking to upgrade to SmartSearch frequently ask what will happen to the documents they have already scanned. The Square 9 Professional Services Group can export the data and documents in your current system regardless of whether it is stored in a proprietary format. Common conversion include: Documentum, Docu2Net, eCabinet File Magic, Fortis, FileNet, and many more.

- **Workflow Analysis and Design**

  Business process management is how work gets completed. Productivity is measured in how efficient the business process is executed. Square 9 Professional Services can provide a personalized action plan to meet any organizations need to improve efficiencies and productivity levels of its staff.

## Mobile Applications

Don't let business come to a halt just because you are away from your desk. Easily access your documents, edit data or workflows through the GlobalSearch mobile platform for web, iOS and Android.