

# papertrail © version 8

## Document Management for the Distributed Enterprise

### Electronic Warehouse

PaperTrail provides convenient, secure access to documents stored in a central repository. Documents are easily searched by index or content. Search results can be viewed, annotated, printed, emailed or faxed with no file movement required.

A full history (audit trail) is maintained for all document activity.

A flexible and powerful permissions structure provides a highly secure environment for all documents. Documents may have any number of attachments, and can be linked to other documents for easy cross-referencing.

Documents can be automatically imported via fax, email or watched folders.

### Electronic Forms and Signatures

Intelligent, dynamic forms are distributed, authenticated and managed using the built-in Forms Module. Communication is streamlined and the cost associated with pre-printed forms is removed.

Forms can be dynamically prepopulated from external databases and information typed into form fields is immediately available for retrieval.

### Document Routing and Collaboration

PaperTrail supports the forwarding and routing of documents to Users or Groups of users. Sequential routes and rules-based workflows can also be set up.

All actions and annotations are seamlessly audited.

The User Interface supports automatic updates to reflect newly arrived documents. No bandwidth or network movement occurs when forwarding documents amongst Users.

### Version Control

PaperTrail audits and controls document content, seamlessly managing the native file format and PDF creation.

Version Control is under full author control, including drafts and major/minor versioning.

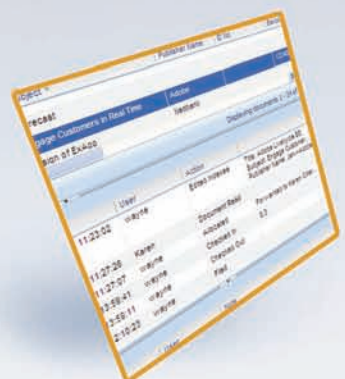
Users can scroll and perform an audited rollback to a previous version at any time.

All previous versions are available in PDF format with the latest revision viewed by default.

### Email Archiving

PaperTrail integrates seamlessly with MS Exchange Server (and other mail servers) to automatically store emails and attachments for efficient search and retrieval.

Emails can optionally be converted to PDF/A for secure compliance storage.



## PaperTrail Clients include

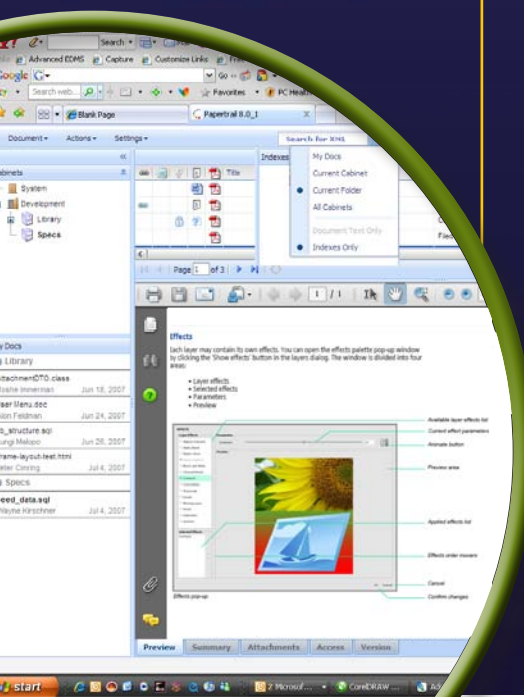
Andersen Transport  
 Blue Financial Services  
 Chevron Texaco (Caltex)  
 Department of Public Works  
 Edcon  
 FNB  
 Metropolitan Health Group  
 Mindcor  
 Nedbank  
 Mandela Bay Metro  
 On the Dot Distribution  
 Parmalat  
 PPC  
 Sanlam Properties  
 SA Reserve Bank  
 SA Treasury  
 Standard Bank  
 TWF  
 Tourvest  
 Flight Centre

## Technical

- OS: Windows, Linux
- Database: MySQL, MS SQL, Oracle
- Browser: IE, Firefox
- Distributed and Federated Architecture
- Custom Scripting
- Java, Web Service, HTTP API's
- Active Directory, LDAP integration

## Contact Us

Egis Software  
 Walbrooke House, 37 Glenhove Rd,  
 Melrose Estate, Gauteng, South Africa  
 Tel +27 11 880 4411 (Jhb)  
 Tel +27 21 914 1375 (Cape Town)  
 www.egis-software.com  
 sales@egis-software.com



## Compliance

- Complies with SARS electronic document requirements
- ISO Compliant (PDF/A)
- File-Plan Compliant (Govt. FPN)
- Embraces ECT Act
- Records Management Compliant
- Adheres to NARS (National Archives & Record Services)

## Records Management and Archiving

Records Management allows any document to be declared as a record within the file plan of the organisation. Documents are assigned record profiles and these determine the retention period, the file plan destination and the disposal authority of the declared record.

## Sectors where PaperTrail plays a significant role

### Government Sector

The government sector draws advantage from the built-in security and audit ability within PaperTrail. The built-in Approval module together with electronic signatures greatly streamlines the approval of documents that often require more than one signatory. Coupled with extensive Records Management and Archiving Tools, PaperTrail serves all of the Government Sector needs.

### Manufacturing Sector

Solutions for the Manufacturing sector include the managing of CAD based drawings; contractual based documents including the ability to edit and change content; eForms (particularly PO requirements as well as basic storage and retrieval needs). PaperTrail security together with powerful and customisable access to information, provides vital protection of access to documents as required throughout the organisation.

### Finance Sector

PaperTrail has been actively deployed within the SA banking Sector for many years, commencing with solutions for the SA Reserve Bank a decade ago.

### Logistics Sector

The Logistics sector benefits from tight integration of OCR/ICR software which allows for scanned images to be auto-imported directly to PaperTrail with both the image and the associated document indexes (for example POD number).

Solutions vary from Storage and Retrieval needs (inclusive of OCR) to powerful workflow solutions incorporating e-Forms, collaboration and electronic signatures. Complete auditing and seamless integration to back-end systems eg CIS / KYC makes PaperTrail the ideal vehicle for efficient access to existing data streams as well as offering convenient front-end reporting and management tools.

### Travel Sector

PaperTrail standardizes processes and procedures for the back office within Travel agencies interfacing with Quicktrav, Galileo, Amadeus and Worldspan.

PaperTrail banking solutions include management of incoming faxes and emails with auto import to relevant groups or workflows, OCR for on document text searching of scanned images, eForms and associated Workflow, digital signatures, text merge with eForms technologies, database look ups and bank wide access to specific information controlled through AD / LDAP integration. PaperTrail is audited by the banks internal auditors on a yearly basis.

PaperTrail automates accounting recons of debtors, customer invoices, purchase orders and supplier invoices.

Electronic invoices are emailed into PaperTrail for prompt payment with all actions audited.