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PaperTrail Frequently Asked Questions



Formscan is a market leader in solutions for secure Electronic Document Management (EDM). Our flagship product, PaperTrail, is available as either a web-based Software as a Service (SaaS) or for running over private intra-nets. Papertrail offers an easy-to-use, fully rebrandable and seamless end-to-end solution for capturing, storing and managing electronic documents online.

Implementation

How is PaperTrail priced?

Formscan prices the entire solution including the use of Papertrail, all supporting purely on storage requirements and document movement. You only pay for the volume of data stored and the number of documents captured or retrieved.

To what extent can I customise the URL to Papertrail?

The URL you use to log into PaperTrail takes the form:

http:// <unit name>.<domain name>.com

You choose the domain name yourself so, for example, if your company is called AB Corp and you have a unit in London you could use http://london.abcorp.com as the URL.

The URL used to

Can I customise my system?

PaperTrail is designed to allow companies to simply add their own logo and select a colour for the banner. You can also customise the help text and legal information.

What hardware does the user need?

Apart from a standard desktop computer running Windows XP or Windows Vista (1 GB) with a minimum CPU speed of 1 Ghz, no additional hardware is required to use PaperTrail for document search and retrieval.

What software is needed to view documents?

No special software is required. PaperTrail is a thin client solution, so data can be searched for and viewed using a web browser such as Microsoft IE or Mozilla Firefox, with a minimum screen resolution of 1280 x 1024.

How long does PaperTrail take to set up?

Once the documents have been scanned and indexed they can be uploaded to PaperTrail immediately.

How much training is typically required?

PaperTrail is designed to be intuitive to anyone familiar with searching and browsing the internet. With minimal training any user can browse and retrieve documents with ease.

Is training provided on site?

User training can be provided on site but we believe in most cases is not necessary as PaperTrail is designed to be intuitive and easy to use. Training materials are available online in the form of Flash tutorials and downloadable PDF training manuals.

Access & security

How is access to documents controlled?

Access to PaperTrail is controlled through a system of users, groups and document types. Documents are assigned a specific type on upload then groups and users are given access to the relevant document types. There is no limit to the number of users or groups so access can be tailored to each clients individual requirements.

What password rules are supported?

PaperTrail enforces:

1. The number of admissible login attempts before an account is locked out
2. The period of time that an account remains locked out before login can recommence
3. The use of new and unique passwords
4. The need to change a preset password on first login
5. The lifespan of a password

How do you store passwords?

All passwords within the PaperTrail system are stored as a secure hash. We follow ISO/IEC 17799:2005 security guidelines for the handling of password security within our application environment.

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How is unauthorised access to documents prevented?

The security of PaperTrail is unrivalled in the world of document management. We operate an independently certified Information Security Management System (ISO27001) which verifies we have the systems and processes in place to guarantee the safety of your documents. In addition our data centres are all SAS 70 Type II/ISO27001 certified and audited on a regular basis. Dual layer, multi vendor redundant firewalls are employed along with 24/7/365 monitoring, intrusion detection systems and an in house security team.

How can we tell who has accessed which documents?

PaperTrail keeps a detailed audit record, capturing and logging every action performed on a document throughout its lifecycle. This information is available via the report section of the administration interface.

How is data transmitted securely to the data centre?

PaperTrail provides a Workbench application that manages the transmission of documents from the clients site to the data centre. All of the transmissions are carried out over 128/256 bit SSL encryption, guaranteeing the security of your documents in transit.

Where are the documents stored?

Documents can be stored either in our state of the art data centre or at your own corporate data centre. Our centre adheres to the strictest security standards and feature redundant power, redundant communications, and redundant environmental controls. As an additional assurance, Formscan provides an option to replicate data to a second data centre so that in the unlikely event of a problem at one facility, clients would connect to the new facility without the loss of data or service.

How secure are the data centres?

Exhaustive selection procedures are carried out to ensure Formscan are hosted in the most secure and reliable environments. All data centres are either ISO27001 or SAS 70 Type II certified, having undergone strenuous audits to examine the security of the premises, the suitability of the environment and the resilience of the systems and networks used.

Do you back up the stored data?

Data stored is backed up to tape on a daily basis and the tapes archived in a secure facility off site from the data centre. Formscan retains the tapes on a 30 day rolling basis. Formscan also provide a service to back up documents to microfilm.

What is the expected availability of the system?

We understand that your documents are critical to your business operation and our goal is to provide the most reliable service possible. System availability is 99.9% excluding any scheduled maintenance.

Who supplies Formscan's SSL certificates?

All of our SSL certificates are provided by

Features & functionality

What is the storage limit with PaperTrail?

Technically speaking there is no limit. PaperTrail will scale to accommodate your storage needs whether messaged in gigabytes or terabytes.

What types of documents can I store?

You can store any type of electronic document in PaperTrail, from scanned documents such as TIFF images and PDFs as well as Microsoft documents, CAD drawings or emails.

How flexible is the document categorisation system?

In addition to grouping documents by document type, users can configure sets of document types corresponding to a particular business function (for example human resources or accounts payable) into various 'cabinets'. Different levels of access can be defined based upon the cabinet structure, and users with the appropriate permissions can create, edit, delete or search across cabinets.

Do we have to use the PaperTrail document viewer to see our records?

Users can choose to view documents using browser plug ins, for example Adobe Acrobat Reader or MS Office, enabling the viewing of documents in a file format not supported by PaperTrail.

Can users create workflows for the processing and approval of documents in PaperTrail?

Users can define workflows based on specific business requirements and then route documents on upload, according to their type, through the various processing steps required. Different users can be assigned various tasks in the process chain to allow efficient and controlled manipulation, validation and approval of documents before they are sent to secure storage. This allows the confirmation of document quality and data index accuracy before ingestion and provides a tool to implement business processes through a secure and auditable system.

How often are new features released?

Formscan have a team of full time software engineers working to ensure that PaperTrail remains the best offering available. We plan to release one new version each year and in addition new features will be added based on customer feedback.

Can users compile reports on usage criteria?

A user with the appropriate user rights can generate a Usage Report detailing the number and type of documents held and the volume of storage used at any point in time.

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What capture functionality does PaperTrail provide?

Formscan offers the leading suite of capture technology to provide an end to end capture, classification and storage solution, all for a single upfront fee. Paper documents can be scanned from PC or network attached scanners, MFDs and copiers directly to PaperTrail, greatly reducing the expense of capturing, managing and securing documents. Our capture technology is supplied by Anydoc Software Inc.

Document Upload

Is there a limit on the file size for transmission?

There are no technical size limitations imposed on data upload to PaperTrail. Efficient transmission will depend only on your internet bandwidth,

Is there a daily upload limit?

There is no limit to the amount of data that may be uploaded each day.

What resolution would you recommend when compressing scanned documents?

We recommend a minimum resolution of 200 DPI - 300DPI is ideal.

What happens if the upload is interrupted for any reason?

Workbench is fault tolerant and will automatically resume after any interruption to the upload process. Batch processes can be paused or resumed by the user at any time and a graphic display keeps you informed of progress.

Upon completion of an upload, PaperTrail will send a detailed notification email outlining the final status of the upload. This email includes details of the documents uploaded, their status and the overall upload time.

How does the Batch Upload process work?

The user selects the document type to be uploaded and imports the associated index data through the Workbench interface. If no index data has been associated the user can enter it at this time. The batch is saved by the Workbench tool and then transmitted by secure 256 bit encrypted HTTPS to the PaperTrail repository. Once ingested, a notification email is sent to the user and the upload is logged for audit purposes.

Can you support distributed scanning from multiple sites?

We can accept documents uploaded from any of your scanning locations.

Can I delete single pages within a document?

A user with 'Edit Page' permission can delete the current page they are viewing or upload a single document to replace that page. This enables users to rectify incorrectly scanned pages without having to upload the entire document again.

Can I perform a large bulk upload from a legacy system?

Uploads of less than 4 GB should be performed online via the PaperTrail Workbench. For uploads of more than 4 GB the files and index data should be loaded onto an external hard drive with USB connection. As a one off service, Formscan will take this drive and load the data directly onto the server.

Integration and recovery

Can I integrate my own software with PaperTrail?

PaperTrail web services (PWS) provide programmatic access to your electronic document store using a simple, secure application program interface (API).

PaperTrail is fully integrated with Metastorm which allows data transfer to most major ERP accounts packages including SAP, Microsoft and Oracle.

How do I get my documents back if I decide to move to another solution?

PaperTrail stores documents in the format in which they were scanned and ingested. PaperTrail has a feature to export files from the system in the same format, allowing them to be imported into any other system accepting files of that format.

What disaster recovery mechanisms do you have in place?

Your data is protected from disaster in a number of ways. Firstly, all data is stored in our data centres on mirrored discs, so in the event of a disc problem there is no risk of data loss. Secondly, all data stored in PaperTrail is backed up to tape on a daily basis and the tapes held for one month in a separate location. Finally, Formscan provides the option of replicating data to a second data centre if you require an extra level of security.

Compliance and certification

What compliance certification do you have?

PaperTrail is certified for ISO27001 standards, in addition all our data centres have either SAS 70 Type II or ISO 27001 certification.

Formscan is currently in the process of being audited for ISO 9001

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