WebDocs 7.2
Features and Requirements
# Table of Contents

*Introduction of WebDocs 7.2*

## WebDocs 7.2 Features

<table>
<thead>
<tr>
<th>Feature</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records Management</td>
<td>2</td>
</tr>
<tr>
<td>DocuSign Integration</td>
<td>4</td>
</tr>
<tr>
<td>Related Files Search</td>
<td>6</td>
</tr>
<tr>
<td>Drag-and-Drop to Add Content to WebDocs</td>
<td>7</td>
</tr>
<tr>
<td>Edit Word and Excel Documents from Web Viewer</td>
<td>8</td>
</tr>
<tr>
<td>Personalized Viewer Settings for Conversions</td>
<td>10</td>
</tr>
<tr>
<td>Email Pages Link from Web Viewer</td>
<td>11</td>
</tr>
<tr>
<td>Visual Workflow Maps</td>
<td>12</td>
</tr>
<tr>
<td>Items In Workflow Widget</td>
<td>13</td>
</tr>
<tr>
<td>My Routed Documents Widget</td>
<td>13</td>
</tr>
<tr>
<td>Parallel Routing</td>
<td>14</td>
</tr>
<tr>
<td>File Transfer</td>
<td>15</td>
</tr>
<tr>
<td>Convert Word to PDFStencil</td>
<td>15</td>
</tr>
<tr>
<td>Click-through Dashboards</td>
<td>16</td>
</tr>
<tr>
<td>Locked Documents Report</td>
<td>17</td>
</tr>
<tr>
<td>View Documents from Reports</td>
<td>17</td>
</tr>
<tr>
<td>Form Design Tools</td>
<td>18</td>
</tr>
<tr>
<td>Attachment Enhancements</td>
<td>19</td>
</tr>
<tr>
<td>Passing Form Parameters via URL</td>
<td>19</td>
</tr>
<tr>
<td>Central Administration</td>
<td>20</td>
</tr>
</tbody>
</table>

*WebDocs 7.2 Editions*

| Edition Comparison Chart                                                | 25   |

*WebDocs 7.2 Requirements*

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebDocs 7 Minimum PC Requirements</td>
<td>28</td>
</tr>
<tr>
<td>WebDocs 7 Server Recommendations</td>
<td>29</td>
</tr>
</tbody>
</table>
Introduction of WebDocs 7.2

With WebDocs 7, we took a product known for its functionality and capability and redesigned it with a focus on user experience. We also added features that customers needed, but were lacking in the market place - such as our analytic dashboards and Public Access capabilities that break down enterprise walls using our forms and search portals to share and receive information.

Your response was overwhelming. The adoption rate alone for WebDocs 7 has eclipsed any other previous release, and we did it in only 7 months. Our support team reports a drop in cases year-over-year, and we've seen requests for partner training go through the roof - we've added classes and increased class size just to meet the demand.

With the arrival of WebDocs 7.2, we look to carry on that momentum.

In June of last year, we kicked off the first of 15 different stability and performance initiatives including new load and security testing products. The products not only helped us when testing WebDocs 7.2, but have set the groundwork for us to make scalable quality assurance advancements going forward.

And to that, we've added over 40 features to WebDocs, most of which are highlighted in this document.

Our goal for this release focused on advancing the feature set already within WebDocs with capabilities to round out the end-to-end customer use case. To do this, we scoured through countless feedback emails and notes from partner meetings to nail down the best and most impactful changes.

Three areas stood out - the need for Records Management, further engaging customers outside the enterprise walls by offering electronic signatures and creating a web-based Central Administration.

As we approached each area, we designed the features based on user experience, and we think you'll be quite impressed with our results!

This guide provides you a first look at these and many other features in 7.2 with descriptions, use cases and even a tip or two along the way. We hope you find it a useful and engaging tool to use with your prospects and customers throughout the year.

Thank you for your continued partnership.

The WebDocs Team
**Records Management**

We're adding a whole new level of security, monitoring and dispositions with the introduction of WebDocs' Records Management tool. We've taken a complex, often painful process and simplified it as only WebDocs can.

With WebDocs, creating a record series, setting classification rules and declaring disposition schedules is a straightforward, well-defined process. From here, WebDocs' automation engine does the rest by auto-tracking and tagging documents, preventing them from early deletion, sending for disposition approval prior to destruction date and, most importantly, destroying documents in a way that's compliant with records management protocol.

Easy to read reports show a quick view of the amount of content in your system that has been classified under the defined Record Classes as well as the amount of content that is scheduled for deletion from the system.

**Page Highlight**

All pages that are included in a record series are highlighted in purple. This can be seen by any user and indicates that this document is locked and cannot be edited in any way, nor deleted from WebDocs.

**Compliance Details**

Users can view record information via the Compliance Details. Those with permissions can undeclare the record from the record series, place legal holds on specific documents and review the record history. Those without Records Management rights are still able to view the document and its compliance details, but are unable to make any changes.
Use Case:

To prepare for compliance of future audits of their Human Resources files, a records manager wants to create a record series to dispose of any I-9 stored in their WebDocs system for more than 3 years. Using WebDocs’ Records Management tool, he can set specific classification rules to find all I-9s in the system and a disposition schedule that satisfies the Human Resources regulations of his company’s state.

Approve for Destruction

The Records Management tab provides you a list of records that are scheduled for destruction. Records managers can approve or dismiss records from destruction, but if they are dismissed, the user must supply a reason and set a new destruction date.

Tracking Throughout the System

Dashboards are provided to those with Enterprise level licenses. These dashboards show various views regarding content creation including record series by count, top record creators and active holds by user. The overview dashboards show system-wide metrics.
**DocuSign Integration**

DocuSign, a leader in Digital Transaction Management, and WebDocs have teamed up to offer a comprehensive document signature tool that can be used in hundreds of solutions. Our direct integration allows you to match WebDocs users with registered DocuSign users to send out contracts, SOWs, loans, employee forms and other documents for a legally-binding signature.

*Note: Each partner must have their own DocuSign demo account. Customers will (at minimum) be required to purchase the Business level license to take advantage of this integration.*

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**Adding Signers**

The best part about this integration is that it’s free for those who are being sent documents to sign. Users list all signers and their email addresses in the “Send for Signature” pop-up. Each signer is emailed instructions for signing the document via DocuSign. They can access it from any desktop or mobile device.

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**Custom Messages**

Senders can draft a custom message to the group of signers. Those with “Send on Behalf of” rights (set up in DocuSign) will be able to choose from a list of other “Send on Behalf of” users. This allows a secretary or legal assistant to send on behalf of their sales team, executives or General Counsel.
Use Case:
Greg has been working on finalizing the Apollo contract with Cynthia for the past week. Now that everything has been reviewed and confirmed, Greg uses WebDocs’ DocuSign integration to send the contract for signature by Cynthia and Charlie Dellis, Apollo’s General Counsel. Cynthia immediately receives the email while working on her computer, while Charlie is currently away from the office but is still able to access the documents through his mobile device. Both signers click on the document link to confidently add their legally binding signatures with just a few clicks of the mouse. The transaction is completed quickly and efficiently.

Upon receipt of both signatures, Greg imports the new contract back into WebDocs, replacing the prior revision. With DocuSign’s reputation for world-class legal protection Greg can rest assured in the integrity of the signed document.

**Signature Panel**

Users can quickly see who has or hasn’t signed the document just by selecting the icon next to the envelope. This will list the name, email and date/time the document was completed by the signer.

For those not using DocuSign Connect, the “Import Signed Document” button appears after all signers have completed their signatures and the document is ready for final storage in WebDocs.

**Signed, Legal Documents**

The signers’ printed names, as well as the date they signed, is automatically populated on the document by DocuSign.

Signers can choose from a list of signatures or choose to provide their own. The system takes them step-by-step through the signing process so that no area is missed.
Related Files Search

Our related files search allows you to search on criteria from both a parent project and a linked project in the same query and is configured using both the Relationships and Search tabs under the parent project's Project Settings configuration. Each parent project can have only one linked project.

Use Case:
At the end of every month, Larry, a senior Accounts Payable clerk, is consistently asked by various department heads for a report showing the different invoices that have hit the GLs specific to their department.

Using the related files search, Larry can enter criteria for both his Invoice project and his GL Code project on WebDocs' Search page and pull back only those invoices that are attributed to the specific GL code.

A Related Files Search adds Indexing Fields from the Linked Project

These fields are not actually part of the AP Invoice project, but are actually from it's related project, Line Items. Using this related files search, users can use one query to narrow down a large range of results.

This can be used in more than just Invoices/Line Items - this would be just as helpful for Loans/Borrowers, Insurance Policies/Insured.
**Drag-and-Drop to Add Content to WebDocs**

Adding documents to a file via the Web Viewer is as easy as drag and drop. A user can drag any type of document over the folder they want to place it in and let go – it’s that easy!

The Indexing Queue and Add Content pages also have the drag-and-drop functionality.

**Use Case:**
Lyla is an Onboarding Coordinator for MGIServ. One of her first initiatives with any new hire is to get all necessary paperwork signed and into the system. Once the new hires read through the documentation and sign their paperwork, they email Lyla the documents. Using WebDocs, Lyla is able to drag each of these attachments from any folder on her computer straight into WebDocs by dropping the document on top of the folder in the treeview.

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**Drag-and-Drop**

Users can drag documents from folders or their desktops straight into WebDocs.

Dropping on top of the file name will prompt the user to specify a separator and/or a divider, but dropping it directly onto the divider name automatically files the document into that divider.

The “+ Copy” tool tip helps users understand which areas they can drag the document into.
**Edit Word and Excel Documents from Web Viewer**

We've made the Web Viewer more efficient by giving you access to edit two of the most common document types in WebDocs – Microsoft Word and Excel. Once the edit tool is installed, users can open Word or Excel documents in their native programs to make their changes. When they close the program, they'll be prompted to save that document back into WebDocs.

**Document Edit Tool**

The edit tool is located along the top bar of the Web Viewer, next to the zoom and rotate tools. This tool is available for Microsoft Word and Excel documents.

**Install, Edit, Save, View**

Users are given step-by-step instructions for downloading, editing and saving the document back to WebDocs. After they've followed the prompts to upload the document back into WebDocs, they'll need to reload the document to see the changes.

Users can also opt-out of seeing these instructions for future editing sessions.
Use Case:
While at the airport, Donna pulls up the most current version of her customer contract to make some updates prior to her meeting with them later today.

Donna is able to open the contract in Word, make her edits and changes, and when she's done with the document, WebDocs prompts her to update the original document with her changes. She confirms and the updated contract is saved into WebDocs. Before boarding, she emails a link to her VP of Sales to let him know the contract is complete but for the customer's signature, and if he could sign on to review and approve it, she'd send it out for signature to her customer's legal representatives via DocuSign.

Saving Back to WebDocs
After the changes have been saved, the user then closes the application and is prompted to upload the document back to the system. Finally, the user is notified that the document has been uploaded successfully.

Once they reload the image in WebDocs, they'll be able to see a rendition of their changes.
Personalized Viewer Settings for Conversions

Users have added conversion options they can set in their Viewer Setting panel for both the Web and Windows Viewers. Options now include converting Word to PDF prior to email or export and converting scanned images into a multi-paged PDF. Users can choose to be prompted prior to conversion or to set the conversions up automatically.

Use Case:
Larry Anders, a clerk in the Registrar’s Office at State University, is in charge of answering student requests for their grade transcripts. Although the transcripts are stored as Word documents, they must be converted to PDF prior to sending them to a student. But for Larry, the task is simple – all he needs to do pull up the requesting student and choose the “Email Page” option from the “Send To” drop-down.

Because he has his Viewer settings configured to prompt him to convert any documents he’s emailing or exporting to a PDF, it’s quick and easy for Larry to check off these student requests.

Prompts to Convert Word Documents to PDFs

The prompting option is nice for users who want to convert their document only at certain times, but not all times.
Email Pages Link from Web Viewer

When collaborating on the documents within a file, users can now email a link that will take the recipient to the file being discussed - giving them quick and easy, yet secure, access to the file without the need to search the system.

Use Case:
Every month, a bank’s branch manager, Carl, sends a report and a link to each of his five largest loan opportunities to his regional manager, Marcy. Since they use WebDocs to store their loans, Carl can use the “Email Pages Link” option in the “Send to” menu to quickly provide Marcy access. She simply clicks on the links from her email to open WebDocs, signs in, and is taken straight to each of the loan opportunities to review.

Where’s the link?
Users can find this link under the “Send To” menu along the top bar.

This feature was available in our Windows Viewer, but is now available in the Web Viewer.

We’re migrating all Windows Viewer features, as well as enhancing and adding features to the Web Viewer so that users can use one viewer for all of their daily uses instead of bouncing back and forth depending on the task.
**Visual Workflow Map in the Viewers, Assignments and Workflow Status Report**

Those who have workflow reports rights will be able to use our Visual Workflow Map. The map will appear in the workflow status report as well as anywhere workflow action buttons can be found - Web Viewer, Windows viewer, and on the Assignments Page.

The map shows the user from which route within a process a particular document took, helping the user better understand where they fall within an approval process, what steps preceded their assignment and who took action on each step as well as which steps are still left in the process before it’s complete.

**Use Case:**
Fred, the AP controller, has invoices assigned to him for payment. One of the invoices is past due and he has a question about why it took longer than normal. Within the viewer, he is able to click on the Workflow Map button and see a visual map of the approval history of the invoice. He is able to see that the document sat on the first approval step for 20 days before it was approved. By seeing this he now has an idea why the invoice was late getting to him and who he needs to talk to about the situation that held up the approval process.

**Step-by-Step Information**
Each assignable step has an information pop-up that shows details as to who completed the step, when it was completed, how long it look and any comments left by the assignee.
**Items In Workflow Widget**

Adding this widget to your workspace lets you view the number of items that are sitting on each step of a specific workflow. Clicking any one of the pie pieces will provide you a list of each assigned document sitting on that step.

**Use Case:**
Courtney, the Regional Sales Manager for MGIServ, needs to see which contracts are sitting on which steps of her workflow in order to know how she should prioritize her workload. The Items in Workflow widget gives her this insight as she’s able to hover over each step to see the number of assignments waiting for attention from her team. Additionally, she can click through to see who the document is assigned to, as well as the customer name and the contract value.

*Image of a widget with pie chart showing workflow steps and numbers of items.*

**My Routed Documents Widget**

This widget will show you all of the workflow items that you initiated that are still in an active workflow. In addition to the list of items, you’re also able to view the workflow map right from the widget, so that you can see where exactly within the workflow process the document you initiated resides.

**Use Case:**
Stan, an MGIServ HR Recruiter, uses the “My Routed Documents” widget to monitor where each of the applicants he initiated reside within the New Hire workflow. This enables him to follow up with whomever owns the step the application is currently sitting on and to give updates to any applicants who call in with questions on next steps of MGIServ’s New Hire process.

*Image of the My Routed Documents widget with a list of items and a workflow map.*
Parallel Routing

Allows simultaneous processing of workflow steps. A routed document can be assigned to multiple people allowing each person to work at their own pace to perform the actions assigned to them. The system will allow users to work on their actions independently, yet concurrently. Once all users have completed their designated tasks the document will continue in the process.

Use Case:
MGI Serv’s Onboarding process starts before the new hire’s first day. As soon as the new hire accepts employment, Stan, the Director of HR kicks off the Onboarding process which consists of preparing the employee’s station and getting him the security rights, logins and materials he will need to do his job.

When Stan initiates the new hire process, the Payroll, Facilities, and IT are all notified simultaneously and each begins the necessary paperwork or resource allocations to prepare for the employee’s first day. Each department engages in their individual tasks, but WebDocs will wait until each department has signaled that the preparations are complete before notifying Stan and the hiring manager that everything is in place for the new hire’s first day.

Multiple Steps for Each Branch
When parallel workflows are used, each branch can take as many steps as necessary before joining again to continue the workflow.

The this scenario, the IT department had two steps they were responsible for - IT readiness to ensure all of the new hire’s accounts were available and Security Set-up to ensure they had access to the areas of the building in which they would be working.
**File Transfer**

Using this stencil, a file and its contents can be transferred from one project to another. Corresponding index fields are mapped to ensure a seamless transfer.

**Use Case:**
After an applicant accepts a new position at MGIServ, their information and documents need to be transferred out of the Applications projects and into the Employee Management project. Using the File Transfer stencil, the workflow administrator can configure this step to occur directly after the manager chooses to hire the applicant. While configuring the stencil, she can map the index fields between the two projects and drop any fields that aren't needed. She can also choose whether or not to retain a copy in the original file.

![File Transfer Stencil Diagram]

**Convert Word to PDF Stencil**

WebDocs can now convert Microsoft Word documents into PDFs within a workflow process.

**Use Case:**
At the end of contract negotiations with a customer, MGIServ requires that all finalized contracts be converted and stored as PDF prior to signing to prevent tampering. To accomplish this, their workflow administrator uses a conversion stencil that converts the document to PDF prior to it being distributed for signatures from the involved parties.

![Convert Word to PDF Stencil Diagram]
**Click-through Dashboards**

Our Dashboard reports just got a handy little enhancement that will make a big impact. In addition to providing a visual representation of critical data, report users are now able to view the content that makes up the report. We call these “click-throughs” and users can place them on their workspaces so that they have the information they need front and center - all at the click of a mouse.

**Use Case:**
As the Director of Human Resources, Jason regularly monitors his WebDocs Dashboards as a way of keeping on top of key performance indicators for his team and monitoring the progression of applications through HR's Application and Interview process.

During his review, Jason sees that applications are starting to stack up on the Phone Screening step. He clicks-through the graph to see which applicants are specifically affected and instructs his team to help mitigate any frustration from these prospective employees. Additionally, he reassigns resources to these steps and begin following up with the various personnel on whom the candidates are waiting.

**Before and After**
The top image shows all of the steps in the Applicant Review process and the number of documents waiting on each step.

By clicking on any one of the steps, the user drills down to see the list of files which are stalled.

Click-through Dashboards are included for the Active Workflow, Login, Users and Workflow History Dashboards.
Locked Documents Report

Much as the name implies, the Locked Documents Report lists which documents are locked within the system. This can be viewed by an individual user or by all users. We’ve also added the capability to view the document directly from the report.

Use Case:
Celia uses the Locked Document Report prior to audits to make sure that none of the documents she’ll need to present are locked. Using this report, Celia can query the locked documents from all users in the system or drill down to one individual user. She can also view documents directly from this report.

Users with access to WebDocs’ reporting tools are able to run a locked document report for a specific project and filter their search by a single user or allow a full search of all system users.

View Documents from Reports

Users are able to view documents from the Workflow Status Report, the Assignment Management Report and the Locked Documents Report.

Use Case:
When pulling reports, Doug has found it useful to be able to view the documents that appear for each query. Prior to this capability, Doug would run reports, but would need to run a separate search each time he wanted to view a document.
Form Design Tools

We've made a number of enhancements for our Forms Designer around attachment handling, field pre-population and styling.

Using the element styling bar, you can now make changes to a single element or multiple elements on a form at the same time. Designers can edit multiple elements by holding down Control during their selection. Text and line components are easily accessible, while our new alignment tools make arranging form elements fast and easy so page layout becomes a breeze.

Use Case:
Cindy wants to alter their current vendor information form found on their web site to make room for drop-downs and comment boxes. Instead of starting from scratch, she can easily build onto her current form. The drag-to-select and alignment tool makes page layout an easy task as she's able to shift the current elements upward to allow for the additional information.

Styling Tools
There are three sections of styling tools: Alignment, Text and Cell.
Having a consistent, central location for these tools improves usability and form design. Users can now highlight multiple elements and make changes to all of them at once.
Attachment Enhancements

We've added functionality in the forms designer that will allow creators to require attachments on form and even route those attachments down a defined workflow.

Use Case:
In addition to redesigning their vendor information form, Cindy also wants to require the vendor to attach their W-9 so that the system can route it to her AP department for processing, which can be done by dragging out the File Upload tool, making it required, and then specifying the workflow process that should be tied to that form in the Form Settings.

More Attachment Options
Want to require an applicant to attach their resume? A doctor’s waiver to a parental consent form? A picture of a receipt for an expense report?
How about routing that attachment down an approval workflow?
With our new feature enhancements, now you can. These capabilities give users more flexibility in how they set up and process their forms.

Passing Form Parameters via URL
When it comes to form functionality, designers can customize the form name via the viewers and have the option to pass field information through specific URLs in order to pre-populate fields.

Use Case:
When setting up their web site for job postings, Jackson, the IT administration assigned to help the Human Resources department, configured the URLs so that when the prospective applicant is searching through the job listings, any “Apply Now” button they click on will take them to a form and automatically populate the department and job ID for the applicant.
Central Administration

Central Administration has been redesigned in a new easy-to-navigate, web-based layout. This new layout features a consistent left-panel navigation and a tab structure that makes setting up a project easy and straight-forward.

This web-based layout gives us more flexibility on capabilities we’re able to build into Central Administration. All of the grids in Projects, Users, Groups, and Vendors are editable so changes for these areas are made directly via the interface without needing to open the component.

We have also made it optional for the administrator to require that all users have an email address in the system. In addition to that, we’ve added the capability for the administrator to force password changes for all users, as well as added a “Last Login” column to make it easy to see when a user was last logged into the system.

Filtering Lists

We’ve added a filtering option that is really useful for the large lists commonly found in the Groups and Users sections. Typing in this box will immediately execute a “Name Contains” search and deliver the results. As the user continues to type out the search term, the list is narrowed even more.

Editable Grids

In addition to creating an editable grid, we’ve moved the most common security options to the front of the Groups section so that setting up groups can be as efficient as possible.

These same grids can be found on the Users, Projects, Vendors and Widget sections as well.
Navigation

Getting around within a project and jumping from one project to another just got a whole lot easier!

All of the separate configurations are listed out and can be accessed at anytime within the project set up from the Configuration drop-down. Related areas like fields, dividers and separators have been combine since they are commonly configured together.

The Project drop-down gives administrators a way to quickly navigate from one project to the next and will take the user to the same configuration page they just left from the project before.

Creating Fields on the Fly

Our editable grid provides administrators more functionality - allowing users to set masks and default values, create option lists and declare project links all on the same page, at the same time.

Areas Not Yet Web-based

We've made some great strides in creating a fully web-based Central Administration, but there are a few areas that have not been converted yet, though they are accessible via the web-based administration: Overlay Designer; Process Designer; Structured Forms Designer; Import Users, Separators and Dividers; Import/Export Templates; Import/Export Projects; Automation Processes; Custom Plug-ins. Note that workflow routes created in WebDocs version 5 will require the administrator to launch the old administration viewer in order to access these.
WebDocs 7.2 Editions
### Edition Comparison Chart

<table>
<thead>
<tr>
<th>Features</th>
<th>Document Management (DM)</th>
<th>Workflow (WF)</th>
<th>Enterprise (EN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Management</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Document Capture</td>
<td>X</td>
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<td>Flexible Configuration (Defined Fields)</td>
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<tr>
<td>Document Library Services (Revisions, Document Locking)</td>
<td>X</td>
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<td>Document Notation (Annotations, Signatures, Stamps)</td>
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<tr>
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<tr>
<td>Web-Based Viewing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PDF Forms</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>HTML Forms</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Global Search</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Online Indexing</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mobile Application (iOS &amp; Android)</td>
<td>X</td>
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<tr>
<td>Full Text Site OCR</td>
<td>X</td>
<td>X</td>
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</tr>
<tr>
<td>Advanced Workflow Processing</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Flexible Workflow Designer</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Validation</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Escalations</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Import</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Email Import</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Social Media Import</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Automated Document Classification &amp; Indexing</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Scheduled Workflow Execution</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Scheduled Report Delivery</td>
<td></td>
<td></td>
<td>X</td>
</tr>
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<td>Responsive Web Forms</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Responsive Web Form Designer</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Public Search Portal</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Forms Portal</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Analytic Dashboards</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>DocuSign Integration</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Records Management</td>
<td>Additional Cost</td>
<td>Additional Cost</td>
<td>Additional Cost</td>
</tr>
</tbody>
</table>

Note: X indicates availability, Additional Cost indicates an additional cost is required for this feature.
WebDocs 7.2 Requirements
Client and Server Hardware Recommendations
WebDocs 7 Minimum PC Requirements

Supported Operating Systems:
• All Windows Vista Systems
• Windows 7 (32 bit and 64 bit)
• Windows 8 (32 bit and 64 bit)
• Windows 8.1 (32 bit and 64 bit)

Supported Internet Browsers:
• Internet Explorer 9.x, 10.x and 11.x. Internet Explorer 10 or greater is recommended.
• FireFox 18.x and greater
• Chrome 28.x and greater
• Safari (Web Viewer Only on a Mac)

Processor:
• Minimum - 1 Ghz
• Recommended - 2 Ghz

RAM:
• Minimum - 2 GB
• Recommended - 3 GB

Other Requirements:
• Microsoft .NET Framework 4.5

Minimum Mobile Requirements for WebDocs Touch

<table>
<thead>
<tr>
<th>Mobile Operating System</th>
<th>Current Version</th>
<th>WebDocs Compatibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablet Browsers¹* (iOS, Android and Windows 8.1)</td>
<td>Version 6.6 and greater</td>
<td></td>
</tr>
<tr>
<td>Phone Browsers¹* (iOS and Android)</td>
<td>Version 6.6 and greater</td>
<td></td>
</tr>
<tr>
<td>iPad App¹</td>
<td>Version 2.1</td>
<td>Version 6.6 and greater</td>
</tr>
<tr>
<td>iPhone App¹</td>
<td>Version 2.1</td>
<td>Version 6.6 and greater</td>
</tr>
<tr>
<td>Android Tablet App*</td>
<td>Version 1.1</td>
<td>Version 7.0 and greater</td>
</tr>
<tr>
<td>Android Phone App*</td>
<td>Version 1.1</td>
<td>Version 7.0 and greater</td>
</tr>
</tbody>
</table>

¹ iOS 6 and greater
* Android 4.1, 4.2, 4.3, and 4.4. Upload support for Android 4.4 is limited.
WebDocs 7 Server Recommendations

The WebDocs application is developed for implementations of all sizes, from small implementations that operate on a single server to large enterprise implementations on multi-server, multi-tier farms. The WebDocs application supports scalable infrastructures that utilize industry standard practices and paradigms for horizontal, vertical and diagonal (combination of vertical and horizontal) scaling. Such standard practices include load-balancing, clustering and N-tier architecture.

Enterprise Installation

An enterprise installation consists of a load-balanced web farm (one or many physical servers and one or many virtual web servers), a load-balanced application server farm (one or many physical servers and one or many virtual web servers), a clustered database server, direct attached or network attached document storage and direct attached or network attached database storage.

A highly-available enterprise installation would utilize fault-tolerant architecture, such as active-passive load-balancing, web and application pools and clustered database and storage servers.

Load Balancer

Industry leading load-balancing equipment such as f5 Networks BigIP local or global traffic manager (LTM or GTM).

Web Servers

Physical web servers virtualized using VMWare ESX technology or Microsoft Hyper-V technology.

Application Servers

Physical web servers virtualized using VMWare ESX or Microsoft Hyper-V technology. Note: Application Servers are not required for WebDocs installations. They are illustrated for security considerations.

Database Servers

Clustered physical servers using 64bit server OS and 64bit SQL Server, fiber-channel connected to fast SAN storage.

Document Storage

Physical servers providing low-latency, high IOPs NAS/SAN storage in a RAID 6 configuration.

Database Storage

Physical servers providing low-latency, high IOPs (RAID 10) SAN storage, fiber-channel connected to database servers.
Minimum Server Recommendations for WebDocs Installations

When setting up a WebDocs installation there are many variables that must be considered when determining the proper hardware. WebDocs is a scalable solution that can grow as the needs grow. This scalability can allow WebDocs to fit into solutions of different sizes by merely adjusting the hardware that is used to host WebDocs. For these reasons, there are no set “Requirements” for servers that are running WebDocs, only server “Recommendations”. WebDocs is a web application comprised of Internet Information Services (IIS), SQL Database and File Servers. Microsoft’s requirements for servers running these components will determine the minimum requirements. Below is the information to determine the server recommendations for a WebDocs system.

WebDocs Installation Levels

Below are installation levels based on the expected usage of WebDocs:

SMALL - Installations
S1 - Less than 1 Million documents and/or 5 Concurrent Users
S2 - Less than 5 Million documents and/or 15 Concurrent Users

MEDIUM - Installations
M1 - Less than 1 Million documents and/or 25 Concurrent Users
M2 - Less than 5 Million documents and/or 50 Concurrent Users
M3 - Less than 10 Million documents and/or 100 Concurrent Users

LARGE - Installations
L1 - Less than 1 Million documents and/or 100 Concurrent Users
L2 - More than 1 Million documents and/or 200+ Concurrent Users
L3 - More than 5 Million documents and/or 200+ Concurrent Users

Note: If utilizing workflow, double the number of expected concurrent users to accurately estimate the installation level.

WebDocs Server Classifications

Below are Classification levels based on the servers that can be utilized by WebDocs:

<table>
<thead>
<tr>
<th>Class</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Dual-Processor Xeon, 64bit, .NET Framework 4.5</td>
</tr>
<tr>
<td>C2</td>
<td>Dual-Processor, Dual-Core Xeon, 64bit, .NET Framework 4.5</td>
</tr>
<tr>
<td>C3</td>
<td>Dual Processor, Dual or Quad Core Xeon, 64bit, .NET Framework 4.5</td>
</tr>
</tbody>
</table>

Concurrent User Licensed Installations

A single web server and up to 50 concurrent users are allowed with a concurrent license. For more than one web server or more than 50 concurrent users, please contact your WebDocs Representative.
**WebDocs Server Operating System Recommendations**

It is recommended that all servers run a minimum of the 64bit version of Windows Server® 2008 or later.

<table>
<thead>
<tr>
<th>Windows Server® 2008</th>
<th>Windows Server® 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Windows Server 2008 Standard Edition</strong> supports up to 32 GB of RAM. This makes it sufficient for a basic WebDocs web server and storage server at the same.</td>
<td><strong>Windows Server 2012 Standard Edition</strong> supports up to 4TB of RAM. This makes it sufficient for a basic WebDocs web server and storage server at the same.</td>
</tr>
<tr>
<td><strong>Windows Server 2008 Enterprise Edition</strong> supports up to 2 TB of RAM and virtually unlimited network connections. Using this operating system on a server gives you the ability to upgrade memory as needed.</td>
<td><strong>Windows Server 2012 Enterprise Edition</strong> is not a version that is offered with windows server 2012.</td>
</tr>
<tr>
<td><strong>Windows Server 2008 Datacenter Edition</strong> supports up to 2 TB of RAM. Using this operating system flexibility to virtualization and scalability.</td>
<td><strong>Windows Server 2012 Datacenter Edition</strong> supports up to 4 TB of RAM. Using this operating system flexibility to virtualization and scalability.</td>
</tr>
</tbody>
</table>

*WebDocs 7.x is supported on 64bit operating systems only*  
*WebDocs 7.x is supported on 64bit operating systems only*

Large WebDocs installations can utilize more than one web server. The amount of concurrent users expected on the WebDocs system will determine the number of web servers deployed in the server environment. Under nominal load, a single web server can serve content for about 50 simultaneous user sessions before experiencing significant performance degradation. User sessions include sessions initiated by Importer and Capture utilities. Typical recommended web servers are single processor, multi-core machines running 64bit Microsoft 2008/2012 Server and configured with a minimum 8GB installed RAM for 64bit systems. The use of virtualization substantially increases the number of web servers available per unit of physical hardware.

A load-balancing solution can be implemented to share the load across the servers and create a fault-tolerant, highly available web system. This can be done with DNS, URL redirection or through the use of a hardware appliance. Microsoft offers a free software-based balancer with Windows called Microsoft Network Load Balancing. This software adds additional load on the web servers but is a reliable load balancer. The Microsoft NLB solution is fairly easy to install and configure and can be installed to existing servers. A hardware based load balancer is recommended for increased performance and fault tolerance. WebDocs On-Demand utilizes f5 LTMs for a hardware load-balancing solution.

More information regarding load balancing and load-balancing techniques can be found at the following web sites:

http://www.f5.com

**Important Note:** When operating WebDocs in a load-balanced environment, the server affinity must be configured so that a user continues to use the server they first logged into, for the duration of their session. Subsequent sessions can be redirected to another server as desired by the load balancing methodology.
Microsoft SQL Server® Recommendations

<table>
<thead>
<tr>
<th>Recommended</th>
<th>Supported SQL Server Versions</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL Server 2012 64bit</td>
<td>SQL Server 2012 64bit</td>
<td>SQL Server 2008 64bit SP3</td>
</tr>
<tr>
<td>Windows Server 2012</td>
<td>SQL Server 2012 64bit</td>
<td>Windows Server 2008 R2 64bit</td>
</tr>
<tr>
<td>16 GB Memory</td>
<td>SQL Server 2014 64bit</td>
<td>8 GB Memory</td>
</tr>
<tr>
<td>Named Instance Recommended for WebDocs</td>
<td></td>
<td>WebDocs should be the only database using resources</td>
</tr>
<tr>
<td>Data files (.mdf) and Log Files (.ldf) stored on separate drives</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Recommended memory for 64bit systems is 16 GB. Typically 4 GB is reserved for the operating system, and the remainder for SQL Server. For recommended installs set the minimum memory value to 8 GB for 64bit systems and maximum to server capacity.

Database backups should be performed daily and index maintenance should be done weekly.

More information regarding SQL Server configuration and best practices can be found at the following web site: http://technet.microsoft.com/en-us/library/cc966534.aspx

Document Storage Server Considerations

Special consideration should be used when planning storage for large WebDocs installations utilizing more than one web server. The document storage path is stored in the WebDocs database and therefore is the same path for all web servers. Each web server must have read/write access to this particular document storage location. The storage technology that meets these requirements completely is Network Attached Storage (NAS).

WebDocs Windows Enterprise Service Hardware Recommendations

A WebDocs Windows Enterprise Service should not be hosted on the same hardware as the WebDocs application or database server. An Enterprise Service should be installed on a separate workstation with the following minimum requirements.

If additional Enterprise Service processing is required, options include adding processing workstations or a virtualized server.

WebDocs Windows Enterprise Service Minimum Requirements:

- Windows 7
- 4 GB RAM
- 250 GB Hard Drive
- i3 Processor
What Configuration Type Will Be Used?

Each Installation Level can have different configuration types. The different types take into consideration the number of servers that will be used to handle the three major components of WebDocs: Web Server, Document Storage and SQL Database. For help in determining the components to be used see the matrix below.

**Type A** - Single Server for WebDocs, SQL Database, and Document Storage  
**Type B** - Two Servers, 1 - WebDocs/Document Storage, 1 - SQL Database  
**Type C** - Three Servers, 1 - WebDocs, 1 - Document Storage, 1 - SQL Database

<table>
<thead>
<tr>
<th>TYPE</th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>USE</td>
<td>OS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LEVEL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S1</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>4 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
<td>100 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>S2</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>4 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
<td>100 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M1</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>8 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
<td>500 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M2</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>16 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
<td>500 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>M3</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>4 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
<td>500 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>L1</td>
<td>Enterprise</td>
<td>Standard</td>
<td>Enterprise</td>
</tr>
<tr>
<td>RAM</td>
<td>4 GB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HD Space</td>
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<td></td>
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<td>Standard</td>
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</tr>
<tr>
<td>HD Space</td>
<td>500 GB</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*All specifications listed in matrix above are minimum recommendations.*