Simple Document Management for Everyone.

eBook

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Smartdoc's user interface. The story.

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Koen and Tom, future founders of Smartdoc, are present at a customer exhibition on scanning and capturing, organized by Fujitsu. During three days, they struggle through dozens of document management solutions. All solutions offer full screen applications with extensive selection menus. A myriad of click options keep hiding other selection menus with hundreds of features.

In the meantime, their minds are swamped by ideas, and their stomachs are looking forward to the closing dinner. At their table they are accompanied by a Swiss professor specialized in process automation. During the aperitif, the group exchanges experiences about sessions they

attended and solutions they discovered. A few drinks later everyone agreed that the document world has become far too complex for common people. The average application behaves like a multi-headed dragon. A user doesn't know which head to face first.

Suddenly, the professor says:

"A user really just wants to get rid of his information quickly, without much effort. He wants to find information whenever he needs and in his own way. And he must be able to do what he wants with the document."

In short, a document management solution only needs three functions: an "add" button, an easy search function and an action button.

That day, the Smartdoc interface was born. The interface evolved, but always remained true to the principle of the three functions.
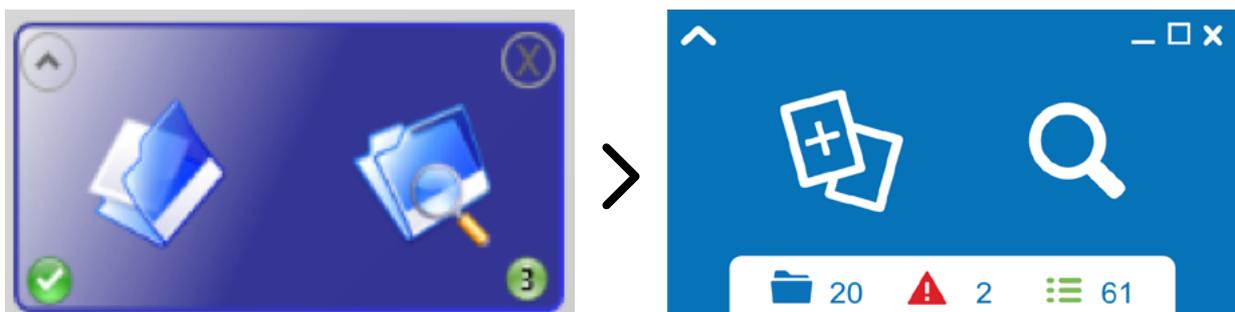
Evolution, not revolution. The Smartdoc interface already received a number of transformations.

The importance of an easy user interface has been extensively proven in recent decades. Driving only became popular when brakes, decoupling and gas were consistently installed in the car in the same order (and in the same place). Computers only found

their way to the crowd after Microsoft launched their Windows 3.1. Previously, the command prompt was the only interface that PC users knew. A smartphone that combined telephone, calendar, camera and games already existed for a long time before the Galaxy or iPhone.

Nevertheless, it still took until Apple's interface and app ecosystem before the mass was raving. Apple's interface disrupted the industry in such a way that the old smartphone manufacturers completely disappeared from the market. Less than ten years ago, everyone wanted a Nokia Communicator. Today, only those born before the century turn still know who this Finnish giant was.

Smartdoc starts from the user experience: the user decides how to add documents to the system.

Smartdoc is marketed in the same way: starting from the user's perspective. Nine out of ten users want to quickly get rid of a document in a central archive. Internet searches happen with Google, but in your own archive you have to double-click seven times through a static folder structure before you – hopefully – find what you are looking for.
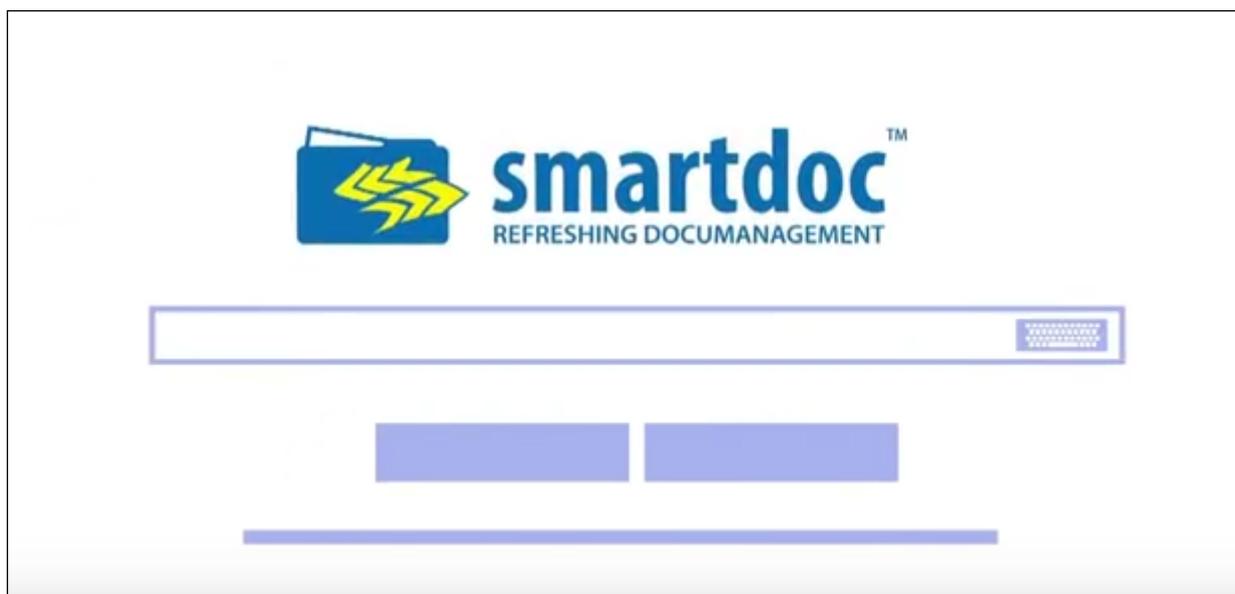
A closer look at the three functions

1. Add documents

Ask your copier supplier's representative about document management and he will talk about scanning. Ask the same to the integrator of your accounting package and he will tell you about invoice management. But there is so much more to documents than just scans and invoices. The site manager returns to the workplace with a smartphone full of photos. The broker keeps files on customer advice and contracts. In the meantime, an email full of information passes and Excel is used to quickly make a calculation during a meeting. Information is created, imported and forwarded. It is literally everywhere. Information is on your desk, it is in your inbox *(Who dares to view his Sent items box?)*. Information is on the file server, on your desktop. And some of it still has to come out probably.

Smartdoc's interface responds to this by letting users choose how to add documents to the system. Via simple scan buttons on Brother or Xerox devices (Smartdoc is compatible with all suppliers of scanners or MFPs), users can send documents directly to the correct department, person or application. Simple plugins for Word, Excel, Outlook, your ERP or other applications enable to do the same. For the many documents that drip into the organization, we provide a simple and easily accessible *drag & drop* system.

←
Drag & Drop in Smartdoc.
Click a document and release it on the Smartdoc icon. The update window will open automatically.

2. Search for documents

Why improve what is already perfect? The first search engines (Gopher, Altavista, Infoseek, Yahoo...) were completely wiped out in the late 1990s by the only search engine that matters. The typical hierarchical search method, mimicking the file server's tree structure, was rather a source of frustration than a source of comfort.

Smartdoc's search engine offers the same methodology. If one search field is sufficient to search the entire internet (most users do not even know the advanced search options), one search field must also be sufficient to search a single company's archive.

However simple, Smartdoc offers more search methods than you thought possible!

Users usually know perfectly what they are looking for. It can be an order number, an invoice that contains a certain amount, an email from a supplier regarding a product code or all information regarding a finished project. Anyone who is able to add a photo to Facebook or to search something in Google, is also able to work with Smartdoc.

Of course, Smartdoc has extensive filtering options that allow you to search a combination of categories, content, periods and document types. Thanks to our extensive index structure, Smartdoc offers more search methods than you thought possible!

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3. Perform actions on documents

Not all users within an organization are assigned tasks. We do not want to bore those users with all options. For users without tasks, all action icons are disabled.

We distinguish three types of tasks in Smartdoc:

The **folder icon** indicates that there are documents ready to be interpreted or assigned. The documents are ready, but have not yet been archived. For example, it can be about incoming mail, delivery notes that still have to be checked for a signature or comments, documents that still need a security or a category.

The **red triangle** indicates validation errors in the system. It is about documents that contain incorrect information or that have not been categorized correctly.

The third icon is the **task list**. To indicate the matter of urgency, we work with color codes: green, orange and red. A task can mean both a notification and a validation or approval. By clicking it, you get an overview of all tasks, per type.

What else does Smartdoc offer?

1. Search results
Search results or tasks are displayed in an easy list. By hovering the cursor over the results you can already see a first summary of the found documents. From the results list you can open, print, share or email information. You can even create direct reports.

2. The extended interface, the flexible helicopter view
Smartdoc offers a handy and flexible overview of all documents in the database. You can sort and subdivide these in any way. You would like to categorize results by year and then by customer? Or rather first by customer, then by year and then by type? No problem either. In Smartdoc, it is possible.

3. The update window: deep automation
Smartdoc tries to automate processes. Whenever possible, we categorize, index and secure your documents automatically after archiving. And we send them to the right person or application.

4. Smartdoc Layer, interpreting information becomes child's play.
Making notes on documents is possible. And even without changing the original master document. To achieve this, we use layers.

5. Smartdoc Plugins: why click twice if a single click does it all?

Save documents first, then archive? Far too much work. With Smartdoc Office Connector you can directly archive from Outlook or MS Office. Even Sent mails are automatically saved in the archive.

Conclusion

A user-friendly and easily accessible user interface is the success factor in every implementation. This makes users find it more useful, pleasant and efficient to complete their tasks. Nobody likes to scan, to refill empty print trays or to replace toners. We all dislike double-clicking seven times to save a document. And we don't want to open 20 leaflets to compile a file. Smartdoc launches an intuitive user interface based on the experiences of thousands of users.

Smartdoc is an application that brings you money instead of costs.

Discover how Document Automation can also help your company.

Do you have questions or would you like to know more about Smartdoc? Contact us without obligation. Our employees are happy to help you: **sales@smartdoc.eu**

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