



Information Management System



In Scope - VBM Q and A

This document is designed to assist Managers and Technical buyers requiring detail information on VBM features and capabilities.

VBM. An advanced enterprise grade information management system, helps you gain control of and share the information and 'know-how' constantly being created around you. VBM provides the tools and technologies enabling you to manage your electronic filing and bring security and visibility to your intellectual property.

Further Information. Can be obtained by contacting Dee Broadmore directly on 0434 549 709 or by emailing dee@vantagekey.com.au

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SYSTEM

Is VBM based upon a client/server architecture?	Yes
Is an online Help Menu offering an Index of Topics and searchable by keyword, similar to that found in Windows, available in VBM?	Yes
Does VBM support SQL fully?	Yes
System Implementation:	
Is a local source of software support available for VBM?	Yes
When on-site support is needed, can response times be guaranteed under an SLA Agreement?	Yes, to same day as initial call
Is a staff member dedicated to software support available during normal business hours?	Yes
Is on-site training available during the installation of the software?	Yes
Is on-site training available on an on-going basis?	Yes
Can the training be customised to meet the needs of a specific client?	Yes
Are training manuals, i.e., software procedure manuals, provided during the training?	Yes
Is on-line HELP available at the screen level?	Yes
Is field level on-line help available at all times?	Yes
Operating System Support:	
Which of the following are fully supported as SERVER Operating Systems:	
MS Windows NT?	No
MS Windows XP?	Yes
MS Windows 2000?	Yes
Which of the following are fully supported as CLIENT Operating Systems:	
MS Windows XP (SP2)?	Yes
MS Windows Vista?	No
MS Windows 7?	Yes
Are "thin-clients" fully supported by VBM?	Yes, Via Citrix



Enterprise Grade
Information Management

info@vantagekey.com.au



SYSTEM	
Network Server:	
Compatible with Microsoft LAN?	Yes
Is a dedicated server required?	No
Is there any limit on the size of a single library?	No
Are any modifications to existing hardware required	No
Backend Database:	
What third party backend databases can VBM operate with?	
Access (Microsoft):	Yes
SQL Server (Microsoft):	Yes
Is a CLIENT database management system supplied with VBM?	Yes, SQL Enterprise Manager
Scalability:	
How scalable is VBM regarding the number of users?	1 to 1,000's

SOFTWARE USABILITY	
User Interface:	
Search Facilities:	
3 powerful search facilities	Yes
Data Dictionary	Yes
Can users search the document database by keyword?	Yes
Can users search the document database by Boolean command string?	Yes
Can users search for documents by keyword and Boolean commands simultaneously?	Yes
Can a user to quickly change which data is displayed in the results of an inquiry or search?	Yes
Can an email be attached to an existing document by linking from the document maintenance screen?	Yes
Can users search emails?	Yes
User Defined Features:	
Customisable Online Help:	
Is a customisable Help facility offering an Index of Topics and Keyword Searching available?	Yes
Can the online help be customised by an administrative user with appropriate security?	Yes
Does VBM provide context-sensitive help, i.e., help specific to individual data entry fields	Yes
Are DETAILED error messages that enable user to identify and correct the problem provided?	Yes
Customisable Screens:	
Does VBM provide the ability for an authorised user to customise the screen background?	Yes

WORK FLOW PROCESSING	
Electronic Forms Support:	
Can VBM utilise electronic forms created by third-party applications?	Yes
Which of the following can create forms compatible and usable by VBM:	
Word	Yes
Excel	Yes
Powerpoint	Yes
Outlook	Yes
Autocad	Yes
To what extent are forms created in these third-party applications be utilised?	Office and Outlook are created directly from the application – templates can be customised if the appropriate licence is in place
Collaboration:	
Can document lists be sent by internal email etc containing hyperlinks to the single instance document?	Yes

DATA CAPTURE/IMPORT

General:	
Does VBM provide the following data capture methods:	
Direct from optical scanner?	No
Drag-n-drop files?	Yes
Drag-n-drop emails?	Yes
Drag-n-drop email attachments?	Yes
Direct from Microsoft Office (integrated button)?	No, Can be created upon request
Direct from Microsoft Outlook (integrated button)?	No, Can be created upon request
Direct from Adobe (integrated button)?	No
Direct from Autocad (integrated button)?	No, Can be created upon request
Does VBM retain original formatting of captured documents?	Yes
Which of the following DOCUMENT file types may be imported directly into VBM:	
CAD files?	Yes
CAD files - Xref?	No
Email (MS Outlook 2007, 2010 .msg)?	Yes
Video Clips?	Yes
Adobe PDF?	Yes
Adobe Postscript?	No
MS Excel 2007, 2010?	Yes
MS PowerPoint 2007, 2010?	Yes
MS Word 2007, 2010?	Yes
Zip (.zip)?	Yes
Audio files (.wav, .mp3 etc)?	Yes
Multi-file documents?	No
What IMAGE file formats may be imported directly into VBM.	
BMP Windows/OS-2 bit-mapped graphics:	Yes
GIF CompuServe Graphic Interchange Format:	Yes
JPG (Joint Photographics Expert Group):	Yes
MPG (Moving Pictures Experts Group):	Yes
MPEG-1, MPEG-2 (Moving Pictures Experts Group):	Yes
TIF, TIFF (Tagged Image File)	Yes

DOCUMENT CREATION

General:	
Does VBM provide a method/s of creating documents?	Yes
Which of the following DOCUMENT file types may be created directly from VBM:	
CAD files including Xref?	Yes, A template
Audio files (.wav, .mp3 etc)?	No
Email (MS Outlook 2007, 2010 .msg)?	Yes
MS Excel 2007, 2010?	Yes
MS PowerPoint 2007, 2010?	Yes
MS Word 2007, 2010?	Yes
Does VBM allow the user to create documents from customised forms?	Yes
How are the forms customised, approved and delivered to the user?	Via approved templates
Version Control:	
Does VBM provide automated version control of documents?	Yes
What version conventions are supported:	
Alpha?	Yes
Numeric? Sub-levels?	Yes
Alpha/Numeric?	Yes
Freeform?	Yes
Are previous versions of a Document available to users?	Yes
Is there provision to show selected users only approved documents?	Yes
Does VBM provide automated Variant control for documents?	Yes

DOCUMENT PROCESSING	
Automated Indexing Capabilities:	
Which of the following INDEXING methods are supported:	
by Author?	Yes
by last activity date?	Yes
by Creation Date?	Yes
by Document Title?	Yes
by Document Number or Code?	Yes
by Category?	Yes
by Keywords?	Yes
by Status?	Yes
by Other?	Yes
Metadata:	
In VBM, is Metadata assigned based on user-defined business rules and security requirements?	Yes
Does the software provides conventional metadata and taxonomy tags?	Yes
Does the Document coding supported by VBM include:	
a date/time stamp when the metadata was assigned:	Yes
a date/time stamp when the metadata was modified:	Yes
geospatial references when appropriate:	Yes
rules for managing document life-cycle (Workstatus):	Yes
Does VBM provide the ability to delete and modify the taxonomy structure and metadata tags once they have been assigned to a document?	Yes
Transmittals:	
Does VBM allow documents to be packaged for transmittal?	Yes
Does VBM create a Transmittal document for the document package?	Yes
Is the Transmittal form customisable per office or project?	Yes
Can the document package automatically be sent by email as an attachment?	Yes
Auto PDF creation	Yes
Auto Zip file creation	Yes
Report Generation:	
What are the search methods used to retrieve document Profile information?	Quick find, filters, data dictionary, search
What is the Full Text Engine or method used by the system:	Document List Filter
Can reports export information?	Yes, via Excel
Does VBM allow user-definable report formats?	Yes, Excel Customisation
Which of the report topics listed below are offered by VBM:	
Files list reporting?	Yes
Files Deletion activity reporting?	Yes
Files Archived reporting?	Yes
Files Accessed Reporting?	Yes
Document Entries by User?	Yes
System Configuration Reporting?	Yes
Document Storage Mapping?	Yes
User Configuration	Yes
Configuration Changes Report?	Yes
Archiving Capabilities:	
VBM allows documents to be selected for archiving (backup):	
by Customer (client)?	Yes
by Creation Date?	Yes
by Document Number?	Yes
by Author?	Yes
by Last Edit Date?	Yes
by Keywords?	Yes
by Category?	Yes
by User-defined Field, category or date range?	Yes
by filename?	Yes
Does VBM rely on the network for archiving functions or does the software include it's own?	Archive Manager
Where will VBM archive documents to?	Client can define



DOCUMENT RETRIEVAL	
Search Functions:	
Does VBM offer a full text search function to retrieve documents with?	Yes, Metadata search
Are descriptive filenames of an extended length used to convey extra information about the contents of each document file?	Yes
Does VBM include a sophisticated user accessible retrieval query engine that offers Boolean operators?	Yes
Does VBM include a sophisticated retrieval query engine allowing user defined search variables?	Yes
Can documents be searched for by author?	Yes
May a document search extend across multiple system volumes?	Yes, Within a chosen vault
Does VBM enable documents be retrieved using a specific or a range of document creation dates?	Yes
Can a search be performed using a pre-defined subject code?	Yes
Does VBM allow searches by user-defined category?	Yes
Can documents be searched for by KEYWORDS?	Yes
Can documents be searched for by document number?	Yes
Can documents be searched for by client or job (customer)?	Yes
Does VBM support document searches employing a RANGE of dates?	Yes
Can documents be searched for using a combination of document profile variables such as AUTHOR, CREATION DATE, etc., and keyword or phrase variables?	Yes
Can more than one user search for and retrieve the same document at the same time?	Yes
Can documents located at remote sites be retrieved?	Yes, Depending upon the network
Can query response lists be filtered by user permission level - only show results the user is authorised to see?	Yes
Does VBM enable personal folders containing checked out documents available on the desktop?	Yes
Can multiple users access the SAME document at the SAME time?	Yes, Subject to the application being used
Can more than one library (repository) be queried simultaneously?	Yes
Is the location of a document transparent to the user?	Yes

REPORTING	
Does VBM enable users to link specific information in other reports and documents by using common indices or hyperlink?	Yes
<i>For further information and to discuss your organisation's specific Reporting requirements please contact Vantage Key directly.</i>	

SECURITY	
Application Access:	
Is a multilevel password based security scheme provided by VBM?	Yes
Are passwords for each employee possible?	Yes
Are passwords for each department possible?	Yes
Are passwords for each entity/corporation possible?	Yes
Are users able to retrieve a forgotten password?	Yes, Via login screen
Does VBM automatically keep a system access log?	Yes



SECURITY	
File Access Rights:	
VBM allows document access rights to be assigned:	
by Directory?	Yes
by Group?	Yes
by User?	Yes
by Document Category?	Yes
Does VBM's security function provide the following GROUP restrictions?	
No Access rights?	Yes
Read Only rights?	Yes
Edit rights?	Yes
See Filename Only?	Yes
Does VBM's security function place the following restrictions on USERS?	
No Access rights?	Yes
Read Only rights?	Yes
Edit rights?	Yes
See Filenames Only rights?	Yes
Does VBM provide it's OWN security function (With Windows folder permissions)?	
Yes	
Does VBM rely solely on the host network's security system?	
No	
Can multiple user security profiles be created to control the access to all of VBM's features and functions enjoyed by different groups of users?	
Yes	
Can a security profile controlling the ability of multiple users to access specific features and functions of VBM be created?	
Yes	
Does VBM enables the creation of a security profile controlling a user's ability to:	
View ALL documents:	Yes
View only specific document groups:	Yes
View only departmental documents:	Yes
What are the levels at which access privileges are established by VBM:	
Individual level:	Yes
Role (position):	Yes
Group level:	Yes
Does VBM provide default user group settings to help speed up initial system implementation?	
Yes	
When using VBM, are process participants able to see only what their security privileges enable them to see (participants see only what they need to perform their activities)?	
Yes	
Does VBM provide the ability to lock and hide specific data fields?	
Yes	
Does VBM utilise Check-In/Check-Out to monitor and verify the integrity of all security settings?	
Yes	

SYSTEM REQUIREMENTS		
Component	Required	Recommended
Operating System	Microsoft® Windows 2000, NT4 (SP3), XP (SP2), 2003, 7	Microsoft® Windows XP (SP2), 2003
Processor	400 MHz IBM PC or compatible, eg Intel® Pentium® II or AMD	Intel® Pentium® III or equivalent
Memory	256 MB	512 MB or higher
Screen	15"	17"
Screen Resolution	1024 by 768 pixels	
Free Hard Disk Space	At least 100 MB for Registered home user	At least 300 MB for any single user license
Software	Microsoft® Outlook XP Microsoft® Office XP	Microsoft® Office 2003/2007 Microsoft® Office 2003/2007 Microsoft® SQL Server 2005 or MSDE 2000
Browser	Microsoft® Internet Explorer Latest	
Network	TCPIP	
Network Speed	50MBS	100MBS
Intranet Speed	10MBS	10MBS
ISP	For Product Registration	

