



*Since 1994, our customers (including the Department of Defense with thousands of users) have enjoyed the simplicity and affordability IMS offers. You, too, can experience this simple-to-use database and our top notch support.*

# Imaging Made Simple Since 1994

## *Document Management System*

**A Content Management System or Document Management System is a customizable database for managing any electronic file types.**



## What benefits can be achieved?

Any office with at least one file cabinet and multiple people will benefit.

Most commonly, people expect a Document Management System (DMS) to help **protect** their most precious information from fire, water, theft, catastrophic weather conditions, or terrorist acts. A Content Management System (CMS) can also be used for **long-term preservation** or to purge documents/content based on retention requirements. A reputable DMS should offer an **open-platform architecture** so that you are truly the owner of your own information. Many offices will produce multiple copies of the same documentation within their company, but this excessive copy and printing should significantly **reduce duplication** after implementing a DMS. You can now have peace of mind knowing all these wonderful benefits including most of all **who did what and when (Audit Trail)** for the ultimate assurance or maybe insurance. A CMS should offer **fast search & retrieval** of documents or information, and allow for an easy or basic search to very specific detailed search (database query type search). It is of the utmost importance to **ensure that a document's integrity is not compromised**; preventing unauthorized access and alterations with use of predetermined **user access security features**. In addition to multiple people with **access to the database from anywhere in the world** (ie: server based, web viewer, connect to pc, or back-up

to CD/DVD/USB Drive/HD), **users can access the same content or document simultaneously**. The most desired user features offer the ability to **apply annotations, notes, images, stamps, and more to a Document**; as just overlays on the document allowing the removal at any time if the user has the security rights to do so. When implementing a CMS, certain processes will simply improve. Take for instance, customer service will have instant and real time access to time sensitive content when needed. **Customer service performs faster** without delay of calling other departments, retrieval from additional databases, walking to a file cabinet, or the very worst driving to an offsite storage unit. The typical **misplaced or misfiled documents will significantly be reduced**. Similarly, speeds can also be achieved in some cases with billing departments. **Reduced overhead costs**, including physical storage space and supplies (file cabinets, boxes, file folders, etc.) are achieved over time if not instantly. **Increase employee productivity**; reduce redundancies and workload, while increasing employee satisfaction and morale are all wonderful experiences once a DMS is fully implemented. Don't forget your **customers or clients ability to now access certain content via VPN or Web Viewer**.



## How does IMS work?

### Import or Scan

Scan paper documents with any TWAIN based scanner. Import any digital files from your computer, server, copiers, and more.

### Index

Once a document or electronic file has been either scanned or imported, it must be placed into a profile that has been customized to fit your particular office needs. There will be several index fields (search fields) requiring a human to type or select from a drop down menu. Automated processes like bar code or zone ocr can save much time and eliminate human error.

### Search & View

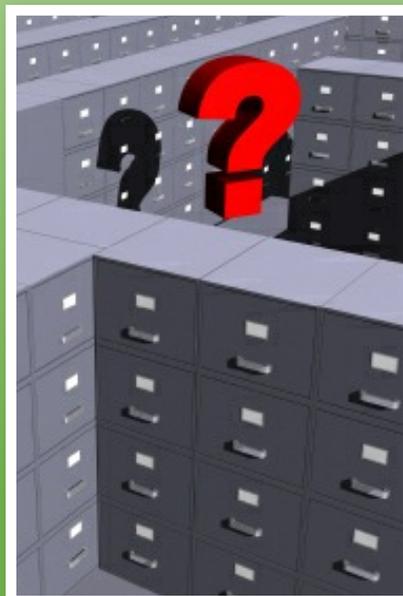
Once information has been entered into the database, a document/file can be retrieved quickly. Simply use one, multiple, or all index fields relative to the particular document(s) being retrieved. Queries can also be performed to search a broad spectrum of information, or they can be narrowed down to a specific document/file.

### Action

Once a document/file has been retrieved, you now have the opportunity to not only view it, but to send this document to another destination by use of fax, email, or printer (3rd party). Annotations may be made by blocking out information, highlighting, attaching notes, blocking entire documents, and adding text. Annotations are simply layers placed over the original document. The integrity of the document will be maintained and will never be destroyed or manipulated. Files may be opened within their native format to be viewed, manipulated, or shared. If changes were made to a file, the integrity of the original is still kept, but the revised version must be re-saved into the system or appended to the original (using version control).

### *Don't limit yourself*

Working with an intelligent and sophisticated database that offers real time information to unlimited users creates a powerful tool within an organization. Communication barriers are destroyed, and access to information is endless.



*“Most industry standard systems and accounting systems limit your organization in ways you may not have considered until now,”*



## Document Control

### Changes at the document level

Many offices simply attach a PDF (scanned document) or electronic files into their content management system that most likely was tailored to their industry. Your current system works well for the most part, except at the document level. Your system only attaches a file or PDF to a client record and possibly allows you to name the PDF; but that is all you get. IMS allows for additional files, appending a document, make changes to a scanned document, or search for a particular document. When you make any of these changes, IMS tracks changes with version control and audit (know who did what and when). You can now use IMS along with your current system.

### Make changes to the actual PDF:

- ✓ Version control
- ✓ Set retention requirements
- ✓ Audit Trail
- ✓ Workflow processes
- ✓ Batch scanning
- ✓ Bar codes for auto indexing
- ✓ Query based search
- ✓ Annotations
- ✓ Stamps or digital signatures
- ✓ Multiple users can access the same documents simultaneously
- ✓ Security, users can only view certain types of documents
- ✓ Allow certain users to make changes
- ✓ Search key words within PDF



## Why Imaging Made Simple?

We have customers across the US ranging from the Department of Defense, police stations, hospitals, schools, universities, and even plumbers. Not only is IMS simplistic in design, it offers the most common features desired in a document management retrieval product. Even though IMS can easily serve an enterprise level company with multiple locations nationwide, it serves small to medium size business just the same. With this in mind, every aspect of IMS from software design, customization, and support; the applicable costs are extremely reasonable. IMS is highly competitive in quality, reliability, simplicity, and affordability.

### *Simplicity*

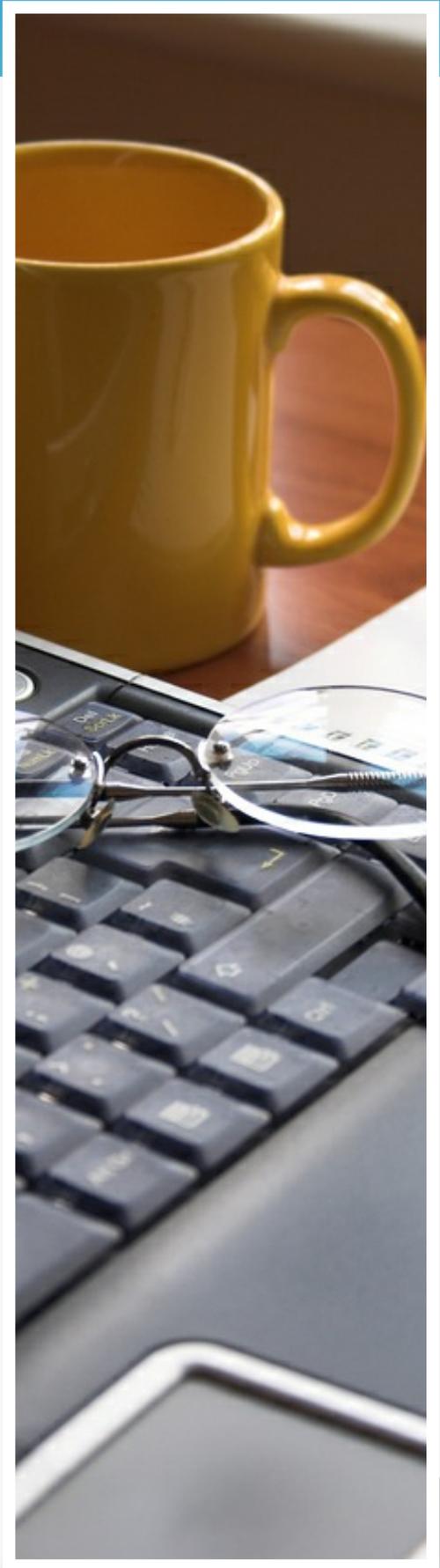
IMS keeps the end-user in mind. IMS will continue to offer the most up-to-date features/capabilities while not compromising its ease of use or simplicity. From your most schooled computer user to those who are limited in computer skills, IMS can be learned within minutes not hours. A typical training for any user will last no longer than 90 minutes. We recognize simplicity as a key to our success.

### *Continued Research & Development*

IMS is on its 4th generation. Since 1994 our product has continued to offer plenty of features. We're always discovering new ways to integrate with other hardware and software vendors. We will continue to offer you the most desired features and integration you would expect.

### *Customization*

IMS can be considerably customized for any business or organization. Sometimes specific customization is needed to enhance your software needs. IMS offers customization at an extremely realistic cost that even small companies can afford.





# Feature Description

**Management Interface:** Create multiple databases called Profiles (additional costs) within IMS. Create users, feature permissions, and levels of security. Create multiple sources for storing the database data. Create search fields and drop down fields. Set default options for scanning and other features. Manage optional features like audit, record level security, distribution, or archive. Each customer or server requires the Management Interface.

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**Profile:** All IMS products come standard with one Profile. Each Profile offers unlimited searchable index fields. Assign a profile for one document type, a series of related document types, or an entire department. Think of a profile as its own segmented database within the database. An average office may have several profiles across multiple departments. One department might have the need for more than one Profile.

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**Batch Scanning:** Some offices continuously scan documents throughout the day and others will scan all documents in bulk at the end of the day, week, or month. Streamlining your scan methods can save time and help your office run more efficiently. Once all the documents have been scanned, they may be easily grouped appropriately before assigning index fields and moving them to their appropriate profile locations. Pages can be removed or added to a document to correct any mistakes that may have occurred in the organization of a file. Many features like rotate, remove blank pages, invert image, separator pages, and page grouping are benefits to using the batch scan process. Batch scanning is part of the Batch Scan Module and the Ultimate Viewer.

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**Batch Scan Station (module):** There are several reasons an organization may want to use the Batch Scan Module versus the Ultimate Viewer for batch scanning. If stations are set up within your office strictly for the purpose of scanning and no search/viewing the documents are desired, you would use the Batch Scan Module. You will have to use the Batch Scan Module to scan document with the bar code feature. Lastly, the Batch Scan Module is limited in functionality compared to the Ultimate Viewer, therefore operating features such as rotate, invert, or blank page removal will perform at faster speeds.

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**Viewers:** To view documents and content within the database you will need to choose one of 4 options. The basic viewer is the most commonly used, offering the most desirable features to the average user. If you desire annotations and key-word text search you would want the Advanced Viewer. The Ultimate Viewer is jammed packed with all the best features. Although the Web Viewer offers the least amount of features, its purpose includes accessibility anywhere in the world, ease of use (user friendly), and compatibility with any device via web browser. See the Viewer comparison page within this article.

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**IMS Route:** IMS Route allows for a record with documents or digital files to be managed within a Profile and to be sent to groups, departments, or individual users. Tasks may be applied to the Route process and steps can be created for a higher level of managing processes. The Route features are limited, more advanced features may be explored with a 3rd Party solution or request a custom enhancement.



# Feature Description

**Import:** Only one Import Module is needed per server. When using Zone OCR (3rd party), bar codes, automation software, copiers, or other products that create a digital file with metadata; you will need to use the Import Module. The Import Module works as a service and pulls content into IMS on a continuous basis.

This feature becomes most helpful when large amounts of digital files have been accumulating on the server or have become an overwhelming web of information. If the naming convention is consistent, it is possible to have the index fields within IMS automatically populated to prevent human error and manual data input. To perform the process described in this paragraph, a script must be created (contact your Reseller for complete details or special services).

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**Distribution:** Export content from the IMS database to disc, jump drive, or hard drive. Distribution creates an executable viewer for searching the saved contents as if the user was using the IMS database. This feature is great for service bureaus or organizations needing the ability to share information with clients or auditors.

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**Archive:** Archive allows for exporting and/or removing data from the IMS database. This feature allows for a complete database or sections to be backed-up to multiple forms of media, including CD, DVD, TAPE, WORM, or hard drive.

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**Record Level Security:** Apply up to six levels of security to certain information within the same Profile. This allows for certain users to access a Profile, but only see certain documents within this Profile.

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**Audit:** Know the who, what, and when of any activity within the database. Audit is for organizations that require extra levels of security for confidential documents that are viewable by many different users. Audit tracks every user's actions being performed on the documents and when these actions are being performed. Audit keeps total control and accountability within a user group and organization, and provides authentication of all information stored within IMS for internal and legal matters. Audit meets industry standard compliancy including HIPPA and SARBAINS.

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**Email - Print - Fax:** IMS allows for any document to be printed, faxed, or emailed. IMS is compatible with any MAPI (Mail Application Program Interface)-compliant email system.

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**Print To IMS:** Print your document directly into IMS. A wizard is launched allowing you to choose a Profile and answer any or all questions (index fields) related to the file.

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**Send To IMS:** Easily and efficiently send electronic files to a Profile within IMS. A wizard is launched allowing you to choose a Profile and answer any or all questions (index fields) related to the file.



# Feature Description Viewer Comparison

FEATURE	DESCRIPTION	Basic	Advanced	Ultimate	Web Viewer
Stamps	user authentication optional, date & time, automation & workflow processes	N	N	Y	N
Batch Scanning*	rearrange, delete, invert, rotate, insert	N	N	Y	N
Append (from scanner)*	scans directly within an existing document	N	N	Y	N
Scanning*	TWAIN scan from most any scanner as Tiff or PDF	N	N	Y	N
Text Search	Search words within text embedded PDF's	N	Y	Y	N
Annotations*	add bitmaps, signatures, pictures, sticky notes, redaction, highlights, text	N	Y	Y	N
Attach File*	button allows attaching any digital file type to a record	Y	Y	Y	N
Add Record*	create record with or without instant indexing	Y	Y	Y	N
Notification <sup>1</sup>	typically when received record within inbox of Route feature	Y	Y	Y	N
Append (from file)*	inserts a Tiff file within an existing document	Y	Y	Y	N
Resize Images		Y	Y	Y	N
Edit*		Y	Y	Y	N
Delete*		Y	Y	Y	N
Reorder Pages		Y	Y	Y	N
Jump to a page		Y	Y	Y	Y
Thumbnail view		Y	Y	Y	Y
Custom Zoom		Y	Y	Y	Y
Streamlined Indexing		Y	Y	Y	Y
Index*		Y	Y	Y	Y
Print*		Y	Y	Y	Y
Email*		Y	Y	Y	Y
Route	Move records & attachments to other users or departments within a Profile/database	Y	Y	Y	Y
Save a local copy*	Save attachments to local PC or server and export Tiff or PDF as different file formats	Y	Y	Y	Y
Print-to-IMS <sup>1</sup>	Wizard for Profile & Index selection along with bulk importing of additional attachments				
Send-to-IMS <sup>1</sup>	Wizard for Profile & Index selection along with bulk importing of additional attachments				

<sup>1</sup> = The Print-to-IMS, Send-to-IMS, and Notification features are stand-alone client products not requiring a Viewer.

\* controlled by user rights

N = No (Feature not offered with this type viewer)

Y = YES (Feature is included)



# IMS Viewer Screen Shots

Search for documents within the left search panel. Click a record (right side) to view image.

The screenshot shows the IMS Viewer interface. On the left is a search panel with 'Quick Search' and 'Advance Search' sections. The 'Records' panel on the right displays a table of document records. Below the records is a 'Files' section with a table of file types and actions.

ImageIndex	Attorney	DOCUMENTTYPE	CASENAME	CASENUMBER	DOCUMENTDATE
101		File Serve Ints			11/3/2016 12:00:00 AM
100	dddssd	Jury	sdxz	fsd	10/10/2016 12:00:00 AM
99	Fred	File Serve Ints		54685266	8/8/2016 12:00:00 AM
98	Fred	File Serve Ints		54155	7/4/2016 12:00:00 AM
97	Fred	Jury		551565	7/4/2016 12:00:00 AM
96	Fred	Ltrs			7/4/2016 12:00:00 AM
95	Fred	Document Production Exh	Roberts vs Flin	5545	6/13/2016 12:00:00 AM
94	Fred	Document Production Exh	james vs roberts	51515	6/6/2016 12:00:00 AM
93	Kevin	Memos	roberts vs flin	5154154	7/11/2016 12:00:00 AM
92					9/21/2016 12:00:00 AM
91	Fred	Motions Notices	albert vs franceen	545454	7/11/2016 12:00:00 AM
90	robert	Jury	james vs flin	125454	6/6/2016 12:00:00 AM

File Type	Description	Version	View	Edit	Delete
XLSX			View	Edit	X
PDF			View	Edit	X
PDF			View	Edit	X
PDF			View	Edit	X

View image: Many features can be applied or performed to the image.

The screenshot shows the document preview area of the IMS Viewer. It includes a toolbar with various image manipulation tools like Rotate, Invert, Fit To Screen, Previous, Next, Actual Image, Scan, Send Mail, Print, Annotate, Add Tiff Page, and Reorder. Below the toolbar is a zoom control and a page indicator. The main content area displays a tax form titled 'Personal Allowances Worksheet (Keep for your records.)' and 'Employee's Withholding Allowance Certificate' for the year 2009.

**Personal Allowances Worksheet (Keep for your records.)**

A Enter "1" for yourself if no one else can claim you as a dependent. . . . . A \_\_\_\_\_

B Enter "1" if: { • You are single and have only one job; or • You are married, have only one job, and your spouse does not work; or • Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less. } . . . . . B \_\_\_\_\_

C Enter "1" for your spouse. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) . . . . . C \_\_\_\_\_

D Enter number of dependents (other than your spouse or yourself) you will claim on your tax return . . . . . D \_\_\_\_\_

E Enter "1" if you will file as head of household on your tax return (see conditions under Head of household above) . . . . . E \_\_\_\_\_

F Enter "1" if you have at least \$1,800 of child or dependent care expenses for which you plan to claim a credit. (Note. Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.) . . . . . F \_\_\_\_\_

G Child Tax Credit (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information. • If your total income will be less than \$61,000 (\$90,000 if married), enter "2" for each eligible child; then less "1" if you have three or more eligible children. • If your total income will be between \$61,000 and \$84,000 (\$90,000 and \$119,000 if married), enter "1" for each eligible child plus "1" additional if you have six or more eligible children. . . . . G \_\_\_\_\_

H Add lines A through G and enter total here. (Note. This may be different from the number of exemptions you claim on your tax return.) For accuracy, complete all worksheets that apply. { • If you plan to itemize or claim adjustments to income and want to reduce your withholding, see the Deductions and Adjustments Worksheet on page 2. • If you have more than one job or are married and you and your spouse both work and the combined earnings from all jobs exceed \$40,000 (\$25,000 if married), see the Two-Earners/Multiple Jobs Worksheet on page 2 to avoid having too little tax withheld. • If neither of the above situations applies, stop here and enter the number from line H on line 5 of Form W-4 below. } . . . . . H \_\_\_\_\_

Cut here and give Form W-4 to your employer. Keep the top part for your records.

Form **W-4** Employee's Withholding Allowance Certificate OMB No. 1545-0074  
Department of the Treasury Internal Revenue Service 2009

1 Type or print your first name and middle initial. Last name \_\_\_\_\_  
Home address (number and street or rural route) \_\_\_\_\_

2 Your social security number \_\_\_\_\_

3  Single  Married  Married, but withhold at higher Single rate.  
Note: If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.





# Software as a Service (SaaS) And Cloud Services

DESCRIPTION	Monthly	PRODUCT NOTES
<b>Must choose one or both options</b>		
SaaS - Enterprise 4.X	\$50	Management Interface, 1-Profile, Audit, Import (includes barcode), Record Level Security, Archive, Batch Scan Module, Route, and Distribution.
Cloud Account Fee	\$50	Base fee per customer account. Includes 1-Profile. Additional viewers and profiles may be added at any time. See below pricing for GB Fees & Audit Trail Services.
Combo (both SaaS & Cloud)	\$80	Combined products and services of the SaaS -Enterprise 4.X (thick client for Windows PC & Windows Server) and Cloud Services (thin client access via any web enabled device). Receive all features listed within both lines above. Includes 1-Profile. See below pricing for GB Fees & Audit Trail Services related to the Cloud Services.
<b>Additional Profiles (optional)</b>		
Profiles	\$20	Each Profile offers unlimited searchable index fields. Assign a profile for one document type, a series of related document types, or an entire department. Think of a profile as its own segmented database within the IMS system.
<b>Choose one or more (see viewer comparison page)</b>		
Cloud User Account (Cloud users may access using a Web Browser)	\$3	One cloud user is a username and password. One user may have access to multiple profiles. Features: Jump-to-page, thumbnail view, custom zoom, streamlined indexing, print, email, fax (3rd party), route, & save copy.
Basic Viewer	\$3	No Scan Capability. Includes all features listed in web viewer, in addition to: attach file, add record, notification, append (from file), resize images, edit, delete, & reorder pages.
Advanced Viewer	\$5	No Scan Capability. Includes all features listed in basic viewer, in addition to: annotations and text search within text imbedded PDF's
Ultimate Viewer	\$7	Includes all features listed in advanced viewer, in addition to scanning. TWAIN, batch scan with many features, and append pages scanned directly into existing documents.

<b>IMS - CLOUD Priced per each GB (billed monthly in rears)</b>	
DESCRIPTION	Monthly
<b>Automatically billed for single server price below</b>	
GB - Single Server	<b>\$1.00</b>
<b>May choose additional below options</b>	
GB - Redundant Server (additional server, typically unnecessary)	<b>\$1.00</b>
Audit Trail to know who did what and when (note: multiplied by total single server GBs and if applicable redundant server GB's)	<b>\$2.00</b>

Additional costs for installation & training, call for quote.

Above price includes support:

- Unlimited upgrades and updates.
- Unlimited phone support M-F, 8-5 (CST), excluding holidays.



# Specifications

## **Cloud Performance** (can perform at any speed)

- Minimum: 5 Mbps download, 1 Mbps upload, 400 ms Latency
- Optimum: 10 Mbps download, 10 Mbps upload, <50 ms Latency
- Cellular: minimum 3G, optimum 4G or better

## **Supported Operating Systems** (the latest service pack is recommended, and .NET 4.x is required)

- Windows Vista, Windows 7, Windows 8 (or Windows 8.1), and Windows 10

## **Memory**

- 2 GB minimum
- 4 GB recommended
- More memory is recommended for scanning large documents

## **Processor**

- Viewing : 1 GHz or faster
- Scanning : 2 GHz or faster, multi-core recommended

## **Hard Drive Space**

- Software installation requires 15 MB of space for each module installed
- Document storage varies greatly, but average figures are:
  - 500,000 Black and White Pages = 100 GB
  - 500,000 Color Pages = 1.25TB up to 2TB depending on the compression

## **Optimum Display Size:**

- Client Version
  - Minimum screen resolution is 1366 x 768
  - Minimum recommended screen size is 17"
- Tablet or cell phone: the larger the better

## **Server OS:**

- Server 2003
- Server 2008 or Server 2008 r2
- Server 2012 or Server 2012 r2

## **Database:**

- Access Database 1-5 users and < 100k records
- SQL Express 5-50 users and < 10 GB database (SQL Express is limited to 1GB ram and 1 processor)

**Data Export:** Customer at any time may request to export data or set up an automated export process for additional costs.

**Special Services:** At any time customer may request special services. Special services may include any scripting, automated processes, or custom reports. Reports could be generated upon data within the index fields, reports extracted from the Audit feature, or even data extracted from content stored within digital files stored in the database. We are very flexible and will consider any request and provide quote for your specific needs.

**Audit Features:** Audit could take up to 5% of your total used disc space.

**3rd Party Solutions:** There are many 3rd party solutions that offer automation and hardware integration. Some products are fully integrated with the IMS products. Contact your sales representative for more details.



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