

Xerox DocuShare CPX 6.5



Feature Set	★★★★☆
Value	★★★★☆
Ease of Administration	★★★★☆
Ease of Use	★★★★☆
Compatibility	★★★★☆
Software Integration	★★★★★
Security	★★★★☆
Reseller Support and Training	★★★★★
Customer Support and Training	★★★★★
Documentation	★★★★★
Global Business Readiness	★★★★★
Upgrade Path	★★★★★

OVERVIEW

Xerox DocuShare CPX is the company's flagship document management and collaboration platform for organizations of all sizes. Via an intuitive Web-based interface, DocuShare helps knowledge workers capture, create, organize and share digitized paper and electronic documents and easily search for and retrieve information stored in a DocuShare repository. The platform also allows companies to replace slow, paper-based processes with automated workflows to streamline the flow of information through an organization and ensure that workers have the data and tools required to complete document-centric tasks at their fingertips.

DocuShare is available in three versions. DocuShare CPX (the subject of this report) offers the advanced ECM (enterprise content management) functionality necessary for integrating and automating transactional content and applying sophisticated collaboration and business process management to specific tasks. It also supports the DocuShare eForms add-on to securely collect, process and manage user input through Web-based forms. DocuShare proper is for organizations that need advanced document management along with Microsoft Office integration, federated search capabilities, database connectors and other tools but not the enterprise workflow, collaborative workspaces, and other advanced ECM functionality of DocuShare CPX. DocuShare Express is suitable for smaller companies or departments within larger organizations that need the most common document management features on a platform that can grow as their needs evolve. Xerox also offers the DocuShare Virtual Filing System, a turnkey package that includes a scanner, the DocuShare software, middleware to connect the two, plus professional services to set up the capture and management environment.

What is Document Management?

Document Management, which is part of content management (sometimes called enterprise content management, or ECM), enables users to organize and manage electronic documents created by a wide variety of applications. When used with scanners or MFPs, document management solutions help organizations convert paper documents into electronic files. This not only allows documents to be accessed far more quickly, but also enables users to much more easily collaborate on the information the documents contain.

Document management solutions are designed for companies that need to enable their employees to work collaboratively or handle document-intensive processes that require many people to access and edit documents. These solutions are designed to aggregate and share content created in nearly any software application and they often make files readable by users who do not have the associated software installed on their PCs.

Product Profile

Product:	Xerox DocuShare CPX
Version:	6.5.3
Software Developer:	Xerox Corp.
Server Requirements:	3.0-GHz Intel Pentium 4 or AMD Athlon MP processor; 2-GB (for 32-bit OS) or 4-GB (for 64-bit OS) RAM; 20-GB hard drive space; Microsoft Windows Server 2003 (R2 or SP2 Standard and Enterprise), Windows Server 2008 (SP2 Standard and Enterprise) or Red Hat Enterprise Linux ES 5. Virtual Server and Sun SPARC platforms also supported.
Client Workstation Requirements:	Hardware and operating systems that support the following browsers: Microsoft Internet Explorer 6 (SP1), 7, or 8; Mozilla Firefox 2.0, 3.0, or 3.5; Opera 9.0; Apple Safari 2.0 or 3.0
Supported Devices:	ISIS- and TWAIN-compatible scanners and MFPs, via the included PaperPort link; Xerox MFPs via DocuShare scan cover sheets (a native DocuShare feature), the Direct Scan feature or DocuShare EIP Connector; non-Xerox MFP control panel integration via scan cover sheets, partner integration, or some middle-ware packages
Suggested Retail Price:	\$7,200 for 20 named user licenses; \$18,000 for 50 named user licenses and 50 concurrent "guest" user licenses
Availability:	The solution is available directly from Xerox, as well as from Xerox resellers.
Service:	Ongoing support and maintenance carry a recommended cost of 25 percent of the original deployment cost.

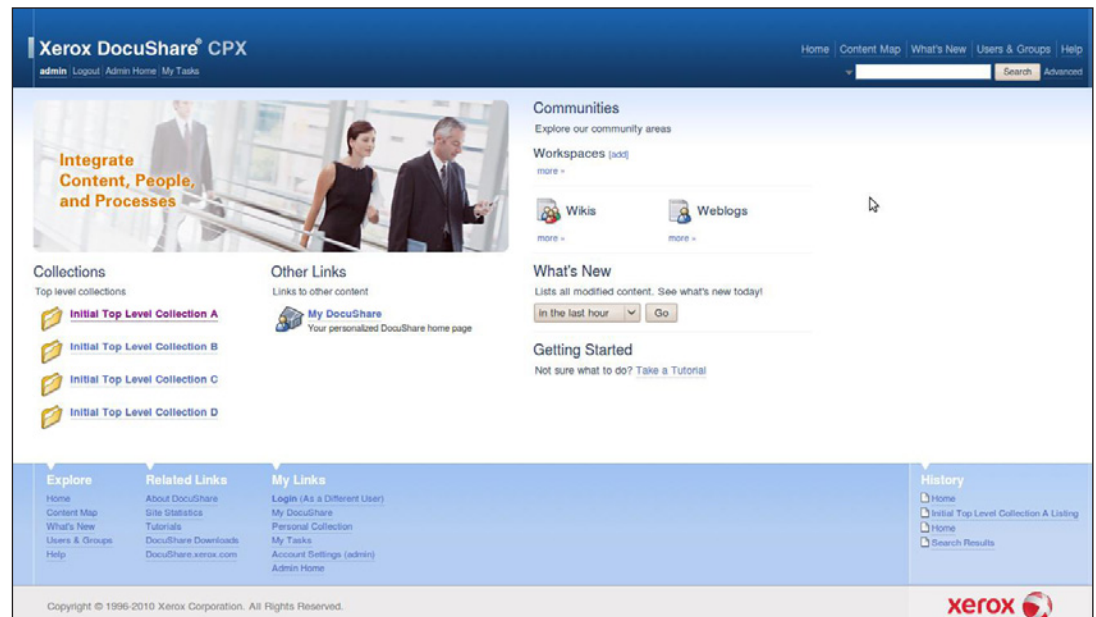
△ What We Thought



DocuShare CPX stands out as a uniquely powerful Web-based document management and collaboration platform. The browser-based interface delivers convenient Web conventions such as a Home Page and a History list with links to quickly jump to recently opened folders or files in the database. The platform also supports the creation of Web documents such as blogs and Wikis, without requiring end users to learn a dedicated Web content management system.

Xerox has loaded DocuShare with a raft of features, including full-text and metadata indexing, document versioning with check-in/check out, scan cover sheets for foolproof document filing, e-mail and Microsoft Office integration and much more. In addition to document management, DocuShare can handle document-routing chores within a company thanks to the program's built-in workflow engine. Using the wizard-based user interface, administrators or users can define a process—for example, to route business documents such as contracts, invoices or expenses for approval.

Particularly noteworthy is DocuShare CPX's Workspaces feature, which lets team members share and collaborate on documents for a given project, set up a shared calendar, communicate within the Workspace and more. This feature is especially important in today's workplace, where remote workers are accustomed to Web-based collaboration services.



DocuShare was built to resemble a Website more than a typical application, complete with a top-level “home page” with links to jump to particular areas or features.

DocuShare also offers excellent connectivity. In addition to the scan cover sheets to route documents, a free connector for Xerox’s Extensible Interface Platform (EIP) found on the newest Xerox MFPs gives control-panel access to DocuShare repositories. For

non-Xerox devices, there are third-party DocuShare connectors available for the leading scan-capture “middleware” platforms such as Nuance’s eCopy ShareScan and NSi AutoStore. And should none of those options be viable, users can simply scan files to a desktop or network folder and use DocuShare’s Add menu to import them.

For all its strengths, DocuShare CPX is missing a few features found in some other enterprise-class systems. For example, there’s no support for redaction, which would allow a user to black out sensitive information (such as Social Security numbers) in stored documents. There is also no way to combine individual documents into a single file or divide a single multi-page document into separate files, and DocuShare CPX does not offer the annotation and mark-up features some users may expect. On the administration front, there is no built-in, automated backup feature; instead, administrators are instructed to follow their database vendors’ backup instructions to safeguard the DocuShare repository.

Strengths

- Excellent Web-based interface supporting all major browsers
- Full complement of features, including full-text indexing, collaboration features, Wiki support and built-in workflow engine
- “Workspaces” feature delivers team collaboration portal
- Maintains an audit trail of document access and changes, and can generate alerts when certain files are changed or deleted
- Cross-platform compatibility enables use in Windows and non-Windows environments
- Free Xerox MFP control-panel integration via DocuShare EIP Connector
- Control-panel integration with non-Xerox hardware via leading third-party can-capture platforms
- Integration with popular enterprise software applications including SAP, PeopleSoft and Oracle Financials
- Support for scan cover sheets that enable untrained workers to easily and correctly scan documents into the system
- Dedicated 24/7 support for customers with a maintenance contract
- Optional eForms module allows companies to create electronic forms that integrate directly with DocuShare

Weaknesses

- No redaction feature to black out sensitive phrases from unauthorized viewers
- No easy way to combine or split documents within the DocuShare interface

Feature Set



DocuShare CPX delivers some unique features that sets it apart from other document management platforms. It delivers most of the features you would expect of a multi-user document management platform, such as the ability to import electronic and digitized hardcopy documents and arrange them into folders (called “Collections” in DocuShare parlance), and to share documents with others on the system with check-in/check-out control and version history. DocuShare also supports both full-text and metadata indexing, which allows users to search for content based on any number of criteria.

In addition to document management, DocuShare can handle document-routing and approval within a company thanks to the program’s built-in workflow engine. Administrators or end users can define a process using the wizard-based user interface; for example, to route business documents such as contracts, invoices or expenses for approval. When a document is uploaded or scanned to the specified folder, the programmed actions happen automatically.

DocuShare was also designed with the latest Web-centric document types in mind, specifically blogs and wikis. Forms within the system let users quickly create new posts, without the need to load and learn a separate blog-creation package. DocuShare supports industry-standard CSS (cascading style sheets) to stylize posts, and all text within a post is indexed for search and retrieval later on.

Advanced features of DocuShare CPX include document encryption, plus audit trail querying and reporting so administrators can track the lifecycle of a document. Both of these features are important for companies that need to comply with federal and state regulations. Another enterprise-class feature of DocuShare CPX is DocuShare Workspaces, a shared area for project and team collaboration where team members can gather and manage shared content, access collaboration tools to facilitate their work, and communicate with one another.

DocuShare CPX also supports the DocuShare eForms module (a \$25,000 add-on), a forms design tool that allows customers to create electronic forms that feed into a DocuShare system. eForms lets businesses replace paper forms to speed and automate processing, improve the accuracy and security of data, and help workers find critical information faster thanks to electronic search and retrieval. The bundle includes the LiquidOffice Form Designer tool, a WYSIWIG design environment where administrators can build new forms (or customize one of the existing templates) through intuitive drag-and-drop actions.

That said, DocuShare CPX is missing a few features users may expect, especially if moving from a traditional desktop document management platform. There is no support for adding highlighter, stamps, redaction, “sticky notes” or other markups to documents; such annotation needs to be done in the file’s native application. Likewise, there is no ready way to merge individual documents into one or split a multi-page document into individual files.

Features New to DocuShare CPX 6.5

- Expanded set of permissions (six versus three) offers additional levels of access to documents, collection folders, blogs, Workspaces and more
- Usage quotas enable an administrator to assign limits to the amount of content a user can store on the site
- Microsoft SQL Server 2005 Express Edition included as the default database
- Performance and scalability improvements mean DocuShare supports up to 50 million documents per server

Value



DocuShare CPX carries list price of \$18,000 for 50 named user licenses and 50 concurrent “guest” user licenses (guests have read-only access to public-facing forms, documents and the like). In addition, Xerox offers a configuration starting at \$7,200 for 20 named user licenses, and the company reports that accommodation can be made for company members who don’t need a full license, but who do need to access documents, participate in automated workflows and so on. This pricing is competitive with that of other enterprise-level document management platforms BLI has evaluated.

Maintenance and support, which include access to interim releases as well as dedicated DocuShare technical support, carry a suggested price of 25 percent of the original deployment cost. While the cost for maintenance is higher than the 20 percent fee common in the industry, it should be noted that the support available is perhaps the most impressive we’ve seen for any solution evaluated.

Ease of Administration



Thanks to the wizard-driven installation routine and excellent documentation, deploying and setting up a straightforward DocuShare CPX system does not require a professional services engagement from the reseller, and Xerox reports that many customers’ IT departments have deployed the platform on their own (including installing the EIP connectors on Xerox MFPs). Administrators will need to be familiar with setting up the

included SQL Server Express database, configuring the Tomcat or IIS (Internet Information Services) Web servers, connecting to an existing LDAP/Active Directory server, and connecting to the existing e-mail platform (if e-mail support is desired). If connecting to an existing Oracle database on the back end, the involvement of an experienced database administrator is recommended.

However, Xerox also notes that if DocuShare CPX's Enterprise Workflow features will be used to create custom workflows or process applications, then (as with any advanced workflow system) customers may benefit from professional services to help plan, design, implement and tweak the automated workflows. Similarly, if a customer is unfamiliar with the technical steps of EIP configuration, or if customization of EIP beyond the basic interface is desired, that can be handled by the reseller in a professional services engagement for a fee.

A plus for administrators is that since DocuShare is Web-based, there is no client component to install (unless the included DocuShare Client Windows interface is desired for some users); users simply need a compatible browser (the solution has been tested with Microsoft Internet Explorer 6 SP1 and later, Mozilla Firefox 2.0 and later, Opera 9.0 and Apple Safari 2.0 or 3.05.5 and later) and a valid log-in. Administrators can assign users a DocuShare-specific log-in or, conveniently, tie users' DocuShare log-ins to their Windows Active Directory password.

Once DocuShare is deployed, an IT administrator and end users (with the appropriate permissions granted by the administrator) will be able to set up custom home pages, create new Collections and Workspaces, and perform other common tasks with the help of the handy Administrator Tutorial and User Tutorial guides Xerox provides.

A user with full Site Administrator privileges will see the entire Administration menu in addition to the typical DocuShare main window. Administrators have full control over the properties of the system's various object types, such as the calendar, folders, discussions, groups, users, domains and so on. While the program offers very granular control over objects, the various pages for setting parameters are remarkably clear to navigate, with drop-down menus and checkbox list to walk the administrator through making changes.

DocuShare supports four types of administrators—Admin, Site Administrator, Content Administrator, Account Administrator—each with unique privileges. The Admin is the top level and grants access to all tools and content. Site Administrators have access to all of the administrator tools, can edit the properties of site objects, and can edit the properties of all user Accounts. Content Administrators have access to a subset of the administrator tools, plus access to object properties, content management and limited access to account management activities. Account Administrators have access to a subset of the administrator tools plus access to account management activities. While these four admin access levels allow IT personnel to have clearly defined roles and permissions, it does add a layer of complexity.

For ongoing administration, DocuShare offers a range of advanced functionality. For example, an administrator can create custom properties for an object class (such as a Collection, Calendar or Discussion). This gives an administrator more granular control

over whether or not certain fields associated with a type of object are required to be entered or can be left blank, whether those fields are read-only or editable, whether they are searchable and more. In addition, an administrator can merge several accounts, and the objects associated with the accounts, into a single user account. This is handy should a user inadvertently create multiple accounts, or if an organization needs to downsize and one person needs access to the objects associated with other accounts. The platform also lets administrators view site repository use and user account activity reports to get a clear understanding of site usage.

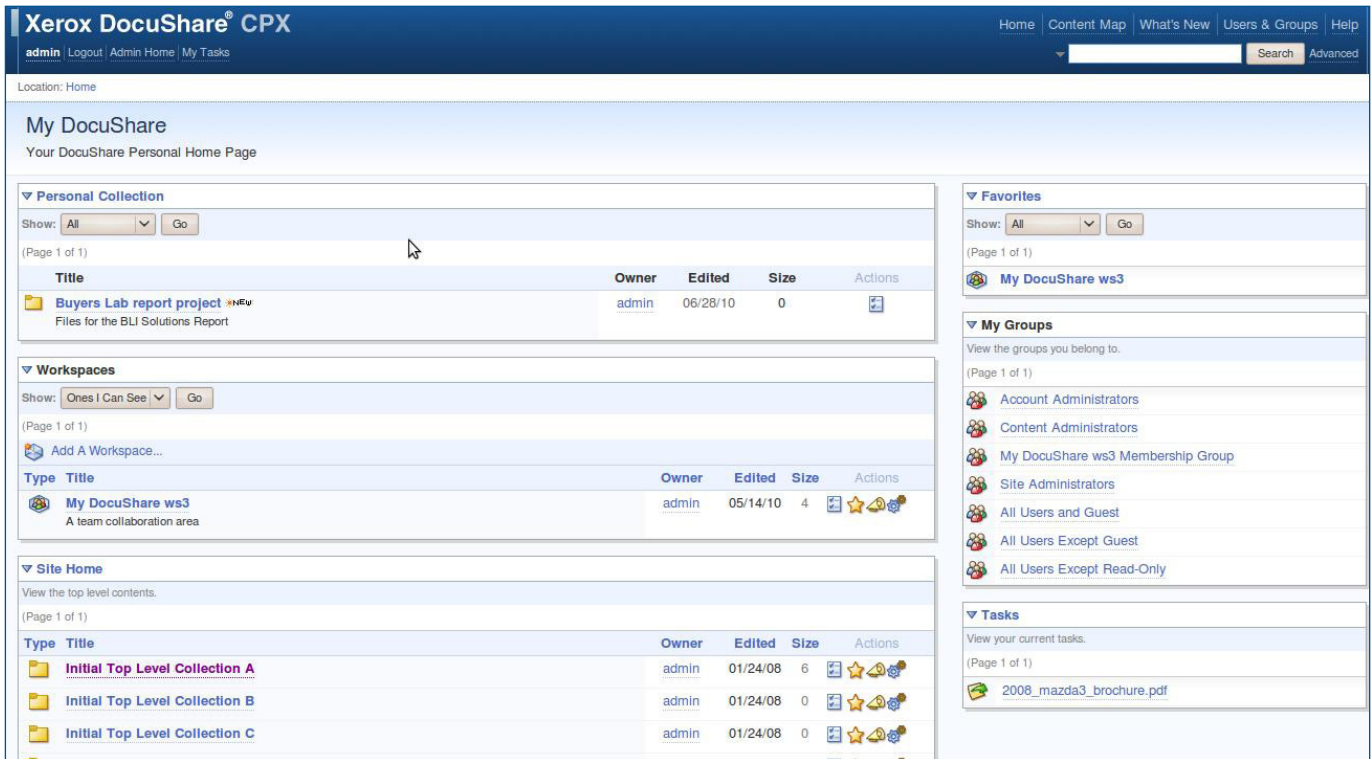
While simple sites will require minimal effort to administrate, Xerox does note that more complex sites may require that the administrator be knowledgeable in database maintenance, HTML programming, command line utility use, and advanced system administration. While this is to be expected of a platform that delivers Web-based ECM and collaboration functionality beyond the more simple document storage and search features of less complex platforms, it is nonetheless a point to consider before deploying DocuShare, especially for organizations with limited in-house IT expertise and resources. Also, BLI technicians were surprised not to find built-in backup features in DocuShare CPX. Instead, the documentation recommends what directories should be backed up, but advises administrators to follow the backup procedures outlined by the vendor of the database being used as the DocuShare CPX repository.

Ease of Use



The Web-page paradigm of DocuShare CPX makes the platform relatively approachable for end users, but it is not without a learning curve. Many users expecting to see a simple Windows Explorer-like folder-tree view will need time to learn DocuShare's conventions and nomenclature—such as “Collections,” which is DocuShare-speak for a folder containing all the documents related to a project. For those that prefer a more traditional look and feel, the Web client does offer a Content Map that provides a folder-tree view into DocuShare; or users can opt for the Windows-based DocuShare Client (detailed below) to gain a Windows Explorer-like experience.

Launched within a browser window, DocuShare is designed more like a Website and less like a traditional client/server application. Indeed, the main user interface is best described as a Home Page: Collections are listed on the left, links to other content to the right of that, and Wikis and Weblogs content links on the far right. The upside of the Web paradigm is that the DocuShare UI delivers conveniences not found in a typical application. We especially like the convenient “What's New” area: A user can select a timeframe from a drop-down list to show all modified content in the last hour, day, two days, three days, four days, or since they last checked. At any point if a user is not sure what to do, the Home Page features a link to a DocuShare tutorial in PDF format (there's one for users and, if logged in as an administrator, one for admins, too).



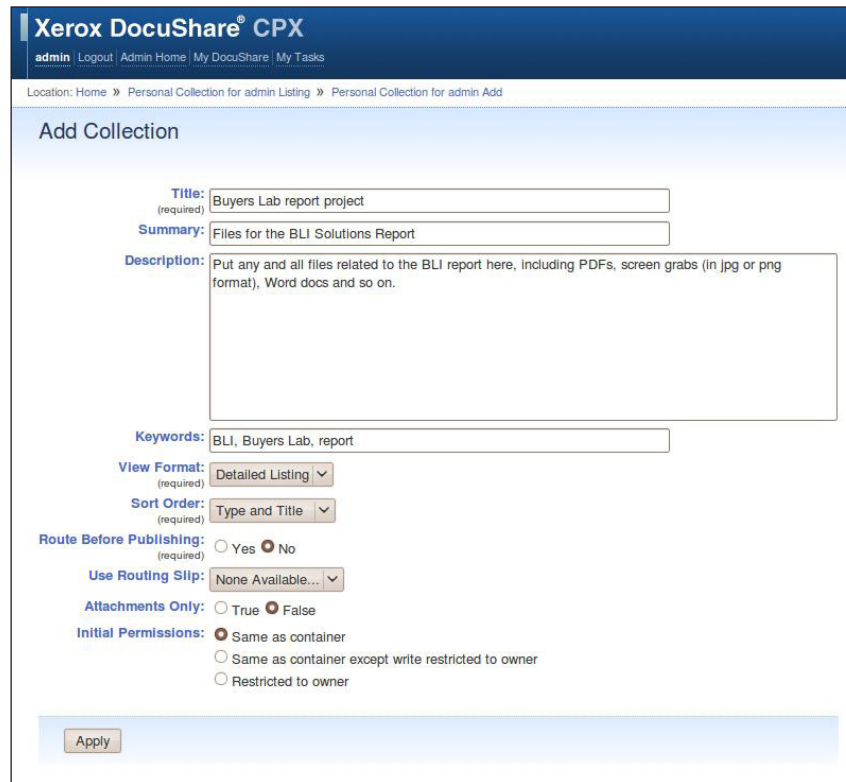
The screenshot shows the Xerox DocuShare CPX 6.5 interface. At the top, there is a navigation bar with links for Home, Content Map, What's New, Users & Groups, and Help. Below this, the user is logged in as 'admin'. The main content area is titled 'My DocuShare' and 'Your DocuShare Personal Home Page'. It is divided into several sections:

- Personal Collection:** A table with columns for Title, Owner, Edited, Size, and Actions. It shows one item: 'Buyers Lab report project' (NEW) with a size of 0, owned by 'admin' and edited on 06/28/10.
- Workspaces:** A table with columns for Type, Title, Owner, Edited, Size, and Actions. It shows one workspace: 'My DocuShare ws3' (A team collaboration area) with a size of 4, owned by 'admin' and edited on 05/14/10.
- Site Home:** A table with columns for Type, Title, Owner, Edited, Size, and Actions. It shows three collections: 'Initial Top Level Collection A', 'Initial Top Level Collection B', and 'Initial Top Level Collection C', all owned by 'admin' and edited on 01/24/08.
- Favorites:** A section showing 'My DocuShare ws3' as a favorite.
- My Groups:** A list of groups the user belongs to, including Account Administrators, Content Administrators, My DocuShare ws3 Membership Group, Site Administrators, All Users and Guest, All Users Except Guest, and All Users Except Read-Only.
- Tasks:** A section showing a pending task: '2008_mazda3_brochure.pdf'.

Users can construct a custom home page that contains links to the collections, blogs, Workspaces and other content pertinent to them.

The DocuShare Home Page also features a link for “My DocuShare”: A customizable page complete with Personal Collections, shared Collections, shared Calendars, and team collaboration areas called Workspaces. The My DocuShare page also offers Favorites links and a Tasks area that shows pending tasks for the user.

Adding a Collection is easy to do. A user simply clicks on the Add a Collection link to launch a Web form where they can fill in a title, summary, longer description and key-words. We appreciate the handy spell-check feature for those free-text fields, which like a word processor underlines misspelled words in red. The form also prompts users to specify the view format for documents in the Collection (a detailed listing or an image, for example), the default sort order for documents in the collection (by title, date, type and so on), the initial permissions for documents in the Collection (such as “writes restricted to owner”) and more.



Xerox DocuShare® CPX
 admin Logout Admin Home My DocuShare My Tasks

Location: Home » Personal Collection for admin Listing » Personal Collection for admin Add

Add Collection

Title:
(required)

Summary:
(required)

Description:
(required)

Keywords:

View Format:
(required)

Sort Order:
(required)

Route Before Publishing: Yes No
(required)

Use Routing Slip:

Attachments Only: True False

Initial Permissions: Same as container
 Same as container except write restricted to owner
 Restricted to owner

To create a new Collection (akin to a folder in a traditional document management application), a user simply clicks on the Add a Collection link and specifies the particulars for that Collection.

Getting documents into DocuShare is uncomplicated and can be accomplished in a variety of ways. Thanks to Xerox’s EIP technology, available on many of its newest MFPs, users can scan documents directly to DocuShare Collections from the control panel of EIP-equipped Xerox MFPs. The connector is available free of charge to DocuShare customers. For non-EIP MFPs, third-party platforms from Nuance eCopy, NSi and others feature DocuShare connectors that enable the same functionality. For foolproof filing, DocuShare CPX supports the use of coded scan cover sheets as a standard feature, which tell the system where the subsequent document is to be stored. This lets the system be used even by untrained employees (such as temps or interns) who might not be familiar with a company’s electronic folder structure.

Users can also use any scanning device to scan to a network or desktop folder, then import the file into DocuShare using the program’s Add menu and browsing to the desired folder. Naturally, users can also import existing electronic documents into the system by the same process. DocuShare CPX also integrates with Microsoft Office applications, so users can save a document to a DocuShare Collection from within the Office application. And users can be notified when a new document arrives in a specified folder, so time-sensitive documents (such as invoices) don’t languish unnoticed.

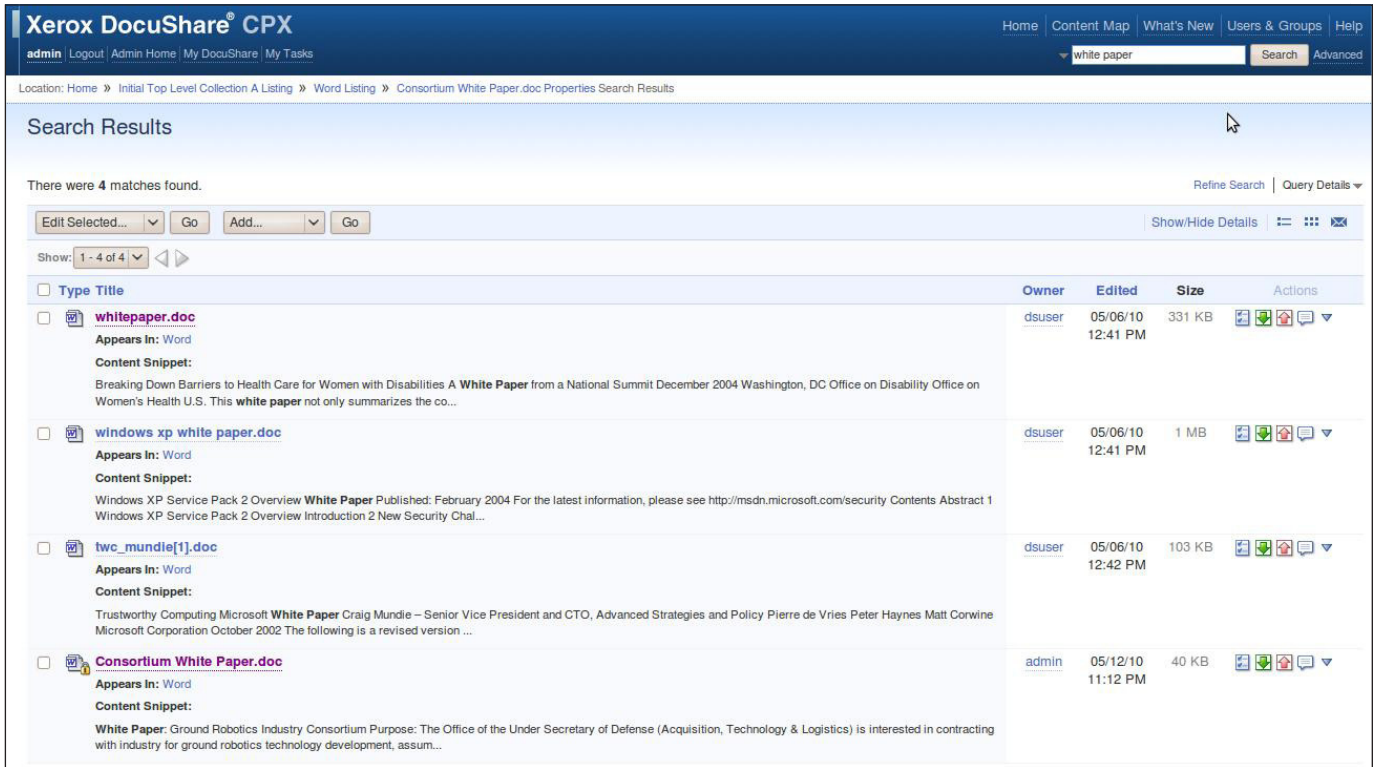
In addition, users can opt to use the included Windows-based DocuShare Client instead of the browser UI. With the DocuShare Client, users can drag-and-drop multiple documents into and out of DocuShare, and perform many other operations through menus, right-click actions, and a Windows Explorer interface. Additionally, an included Outlook Client supports drag-and-drop and other operations from Microsoft Outlook, and a WebDAV Client provides similar support in environments that support WebDAV.

Working within Collections is also very straightforward. The Collections lists show the title of the folder, the owner, when a document contained in it was last edited and the number of documents the Collection contains. The last column in the listing shows icons for actions that can be applied to the Collection, such as adding it to Favorites or creating a notification. Clicking on the Collection name drills down into a sub-list of folders according to the sort order set by the owner (by document type, for example). Drilling down further gets the user to the list of individual documents. As with a browser, users can return to the previous level by clicking on the browser's Back arrow; DocuShare also shows a handy History list on the right so users can jump to any of the previous half-dozen pages viewed with one click.

With an individual document selected, users can click on an icon to see its properties (including permissions, version history, comments and more), check it out for editing (which locks out other users from editing it), upload a new version, add comments (which are maintained as a separate, searchable file), or perform a host of other actions including deleting the document (assuming the user has permission to do so), adding it to their Favorites, and routing it to a user or workflow. Users can also select to preview the document by selecting View in HTML from the actions list, or by using DocuShare's Image Viewer feature. The Image Viewer supports PDF, GIF, JPEG, PNG, TIFF files and HTML viewing supports more than 60 file types, including those of the most popular—and not-so-popular—applications.

To work with a stored document, the user can click on its name in the list or click on the "download and lock" icon. The browser then prompts the user to "Open with" the default program associated with that file type. Users then work directly in the familiar program to make their changes, then hit save to put the updated version into the DocuShare Collection. Importantly, while users will see the latest version of a file as the default choice in the file list, DocuShare maintains a version history so previous iterations are always available.

The version-control features in DocuShare make it easier for groups of users to peacefully co-exist in the system. For example, if a file is open on another user's PC, DocuShare Express shows a padlock icon on the filename. Other users can hover their cursors over the entry to see the name of the user who has it open or open a read-only version of the file.



Xerox DocuShare® CPX

admin | Logout | Admin Home | My DocuShare | My Tasks

Home | Content Map | What's New | Users & Groups | Help

white paper Search Advanced

Location: Home » Initial Top Level Collection A Listing » Word Listing » Consortium White Paper.doc Properties Search Results

Search Results

There were 4 matches found. Refine Search | Query Details ▾

Edit Selected... Go Add... Go Show/Hide Details | [Icons]

Show: 1 - 4 of 4 [Navigation]

<input type="checkbox"/>	Type	Title	Owner	Edited	Size	Actions
<input type="checkbox"/>	Word	whitepaper.doc Appears In: Word Content Snippet: Breaking Down Barriers to Health Care for Women with Disabilities A White Paper from a National Summit December 2004 Washington, DC Office on Disability Office on Women's Health U.S. This white paper not only summarizes the co...	dsuser	05/06/10 12:41 PM	331 KB	[Icons]
<input type="checkbox"/>	Word	windows xp white paper.doc Appears In: Word Content Snippet: Windows XP Service Pack 2 Overview White Paper Published: February 2004 For the latest information, please see http://msdn.microsoft.com/security Contents Abstract 1 Windows XP Service Pack 2 Overview Introduction 2 New Security Chal...	dsuser	05/06/10 12:41 PM	1 MB	[Icons]
<input type="checkbox"/>	Word	twc_mundle[1].doc Appears In: Word Content Snippet: Trustworthy Computing Microsoft White Paper Craig Mundie – Senior Vice President and CTO, Advanced Strategies and Policy Pierre de Vries Peter Haynes Matt Corwin Microsoft Corporation October 2002 The following is a revised version ...	dsuser	05/06/10 12:42 PM	103 KB	[Icons]
<input type="checkbox"/>	Word	Consortium White Paper.doc Appears In: Word Content Snippet: White Paper: Ground Robotics Industry Consortium Purpose: The Office of the Under Secretary of Defense (Acquisition, Technology & Logistics) is interested in contracting with industry for ground robotics technology development, assum...	admin	05/12/10 11:12 PM	40 KB	[Icons]

DocuShare features robust search capabilities, and the results list returns a list of found documents with important information to help the user identify the right document, including a snippet of content from the document.

DocuShare also supports very robust search capabilities. In fact, some users may choose not to use the folder-hierarchy navigation at times, instead opting to use the familiar browser search bar to quickly find documents. For a simple search, users can enter the search term into the search bar and click on search. The results list will return matches showing the document name, type, owner, date last edited and, conveniently, a snippet of the document contents. Directly from the list the user can then open the document or select one of the same actions (properties, check out, upload new version, add comments, and so on) presented when the document entry is shown in the folder view. The Advanced Search option on the search bar opens a page where the user can specify a more targeted search by entering parameters such as where in an entry (the title, description, document content and so on) to search for the term and the desired sort order (by rank, title, date, owner and more). The user can also enter a date range to search with handy drop-downs to create a specific query, such as “Modified Date” “is after or on” a date selected from the pop-up calendar; and also specify what object types (Collections, Documents, Discussions, Events, and so on) and document types (PDF, Excel, Word and so on) to include.

Compatibility



DocuShare supports scanning of hard-copy documents into the system from any ISIS- or TWAIN-compatible scanner or MFP, using the free/included PaperPort link. Users can also use any scanning device to scan to a network or desktop folder, then import the document via DocuShare's Add menu. DocuShare is also compatible with the EIP offered by the company's newest MFPs. That means by simply touching the screen of an EIP-enabled Xerox MFP, users can scan documents directly into DocuShare folders and even enter index data. The connector is available free of charge to DocuShare customers no matter how many Xerox MFPs they want to connect. For companies that don't have an EIP-enabled MFP but still want a direct connection from the capture device to DocuShare, third-party connectors are available for Nuance's eCopy ShareScan platform, NSi AutoStore (and the Xerox-branded SMARTdocument Travel equivalent), Kofax Ascent Capture, Omtool Accuroute and other scan-capture platforms.

Unlike some other platforms that are Windows-only, DocuShare CPX is compatible with a wide range of operating environments. Microsoft Windows Server 2003 and Server 2008 are supported, as are Red Hat Enterprise Linux ES 5 and Virtual Server and Sun SPARC platforms. On the client side, DocuShare needs only a Web browser. According to Xerox, the system has been tested with all the leading browsers, including Microsoft Internet Explorer 6 (SP1), 7, and 8; Mozilla Firefox 2.0, 3.0, and 3.5; Opera 9.0; and Apple Safari 2.0 and 3.0. (BLI evaluated DocuShare on a Virtual Machine running Linux and Firefox.)

Software Integration



DocuShare CPX's integration with other software and systems is excellent. The platform integrates with LDAP/Microsoft Active Directory, streamlining the log-in process for users. It also offers an Email Agent as a standard feature, with which administrators can set up an automatic process so that all incoming e-mails will be brought into the system to a specified location. This allows users to send e-mail messages and attachments from any desktop to any collection or group within a specific DocuShare site. DocuShare CPX also integrates with Microsoft Office applications, so users can save a document to a DocuShare Collection from within the Office application.

DocuShare also integrates with Microsoft SharePoint via two methods. First, Xerox provides free WebParts for integrating DocuShare with the SharePoint Portal. In addition, a FAST search engine connector is available from a third party, for repository integration between DocuShare and SharePoint. (Repository integration from Xerox is planned for the next major version of DocuShare.)

The DocuShare repository is also ODBC compliant, so DocuShare data can be migrated to other database platforms. DocuShare data can also integrate with enterprise applications such as Oracle Financials, SAP Portal, PeopleSoft and CRM systems, through third-party integrations or the DocuShare SDK.

Security



To secure DocuShare repositories, users can be required to log on either using the same user name and password they use to log on to their PCs (via Active Directory integration) or by using an administrator-assigned user name and password. The system supports six user levels for system access, including Guest for public Web access (ideal for companies that want to allow customers or clients to retrieve documents such as forms), Read-Only Access, DocuShare Access for content contribution and editing, and CPX Access for team Workspaces and process management.

The solution maintains an audit trail of document access and changes, and can also generate alerts when certain files are changed or deleted. For more advanced security needs, DocuShare integrates with digital signature and digital time-stamping technologies available from third parties. And DocuShare CPX offers file encryption for stored files as an optional feature. However, DocuShare does not support redaction (where sensitive phrases in a document are blacked out for viewing, but remain in the document), which is a relatively common feature among document management applications.

Company Profile

Vendor:	Xerox Corporation
Phone:	800-735-7749
Web:	www.xerox.com ; http://docushare.xerox.com
Status:	Publicly traded
2009 Revenues:	\$22 billion
Employees:	130,000

Reseller Support and Training



Xerox offers very thorough training and support for DocuShare VARs, system integrators and authorized Xerox resellers. Online DocuShare user and administrator courses and an instructor-led technical training course is required for basic reseller participation. To become a Gold or Platinum DocuShare partner, a reseller must successfully complete a \$3,500, 4-day technical training course at a certified training center. Successful completion includes a subscription to the DocuShare Developer Network. A training course is delivered for each major release of the platform, along with a course that specifically covers the differences between the old and new versions. Xerox also provides resellers with a range of collateral materials, slide presentations and Webinars.

Customer Support and Training



DocuShare customers have access to very extensive online support and training resources. Xerox maintains a searchable knowledge base where users can find answers to questions as well as how-to articles. The company also offers free online e-learning courses for users and administrators; these pre-recorded seminars cover a broad range of topics and allow customers to learn DocuShare at any time and from any location. Xerox also supports the DocuShare User Group, an online community where customers can access software downloads and product documentation, and get hints and tips from other members.

Technical support is available for customers with a current maintenance agreement (or for those in the 30-day free trial period) via Web form, e-mail inquiry, and 24/7 toll-free phone support. Importantly, the support line is dedicated to DocuShare customers, and a menu choice ensures customers are connected to a technician familiar with their operating system. Calls made to the call center by BLI at various times were answered promptly, and we were connected with a rep in less than a minute each time.

Documentation



The DocuShare documentation, which covers DocuShare Express, DocuShare and DocuShare CPX, is excellent. Xerox provides a 24-page Admin Tutorial, plus a 163-page Administrator Guide that thoroughly covers all manner of topics, including the administration user interface, database setup, scanning to DocuShare, managing user accounts,

backing up and restoring a DocuShare repository and much more. There are also separate guides that cover installation, the Email Agent, LDAP/Active Directory integration and the DSUpload utility for administrators to quickly load numerous files into Collections. A separate User Tutorial and a 140-page User Guide is similarly complete. Features or topics that apply to only a subset of the DocuShare products are clearly marked.

All guides are written in plain, easy-to-understand language, and the searchable PDF documents offer hyperlinked tables of contents to make it easy to find the topic of interest. The guides don't offer screenshots of the actual user interface as do many other guides, but every topic is clearly explained, with tables showing menu choices and what each means where appropriate.

Global Business Readiness



Xerox is a global Fortune 500 company with a presence in more than 160 countries. DocuShare is currently sold and supported in 70 countries worldwide, including North America, Latin America, Western Europe and parts of the Middle East, Africa, and the Asia-Pacific region. The solution is available in English, French, Italian, German, Spanish, Japanese, and Simplified and Traditional Chinese. Xerox also offers a localization kit to enable partners and Xerox operating companies to localize DocuShare and its documentation in other languages (languages that have been provided by local operating companies include Dutch and Russian).

Upgrade Path



One of the strengths of DocuShare is that it is impossible for a customer to outgrow the platform, since the system scales from the entry-level Express offering to the enterprise-caliber DocuShare CPX. In fact, to move from one level of DocuShare to the next, there's no need to reinstall any software or migrate any documents. Customers simply purchase new licenses, which enable the more advanced features of the higher-end product. This flexibility not only gives smaller companies plenty of headroom as their needs increase, it also enables a larger company to try the platform in a single department before rolling it out to more of the organization.

Xerox updates the DocuShare platform on an ongoing basis, with smaller point releases being made available every few months, and new versions appearing every 18 months or so.