

MatchPoint

• itsystems

# MatchPoint 2007 finds the needle in the haystack.



## **Mountains of data as far as the eye can see:**

Companies create most of their data using office tools. What we used to stack on our desks is now on our file servers. Rigid directory structures make it hard to find and use information on a company-wide basis. The tools that we use to access this information are often quite unhelpful. For example, full text searches deliver hundreds of imprecise results and directory navigation is slow, complex and inflexible because it only provides a hierarchical view of the documents.



## **Making information out of data:**

MatchPoint 2007 elegantly solves this problem by enhancing the data with descriptive information called metadata. Metadata transform unstructured data such as documents or emails into coherent, classified information objects. Metadata are the key to finding and using information on a company-wide basis. Search efficiency increases because metadata can be searched for specifically, thus achieving complete, precise and clear search results. Customer name, order number, and invoice date are only some of the possible metadata that deliver high-quality results. Using MatchPoint 2007, you can search in your documents as specifically as you would in your structured ERP system.



*MatchPoint 2007 uses metadata to link information similar to the way LANs link servers and workflows link tasks.*

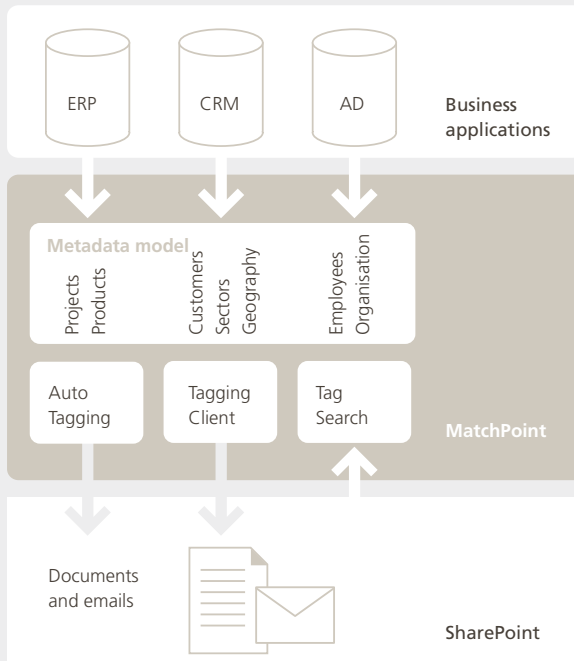
# MatchPoint 2007 automatically categorises documents and finds them no matter what situation you are in.

## The best of both worlds:

We all love storing documents in unstructured systems like file servers. Saving is a snap using „Save as...“ or drag & drop. On the other hand, trying to find the data again can be a nerve-racking experience. It is much easier to find information in structured systems like our ERP system. Searches for the order number or customer number achieve hit rates of 100 percent. MatchPoint 2007 combines the simplicity of the file server with the structuredness of the ERP system. MatchPoint 2007 maps the characteristics with which documents and emails can be identified in the metadata. The software automatically tags documents and emails when you save them, making them easy to find since they fall into a clear category.

## Multidimensional instead of one-dimensional:

Conventional file servers can only show data in a one-dimensional view that is limited to all documents in a specific directory. If your documents are stored ordered by customer, you have no chance of displaying them ordered by product or by region. In contrast, MatchPoint 2007 uses metadata for searches, meaning that you can view the documents any way you want. You are just one mouse click away from switching from the customer view to the product view and drilling down to the regional information. MatchPoint 2007 works the same way as your ERP system in that it lets you look at your document storage from all sides, turning it like a die and filtering according to various criteria.



*MatchPoint 2007 maps the characteristics with which information can be identified in the metadata model and applies them to unstructured data as descriptive information.*

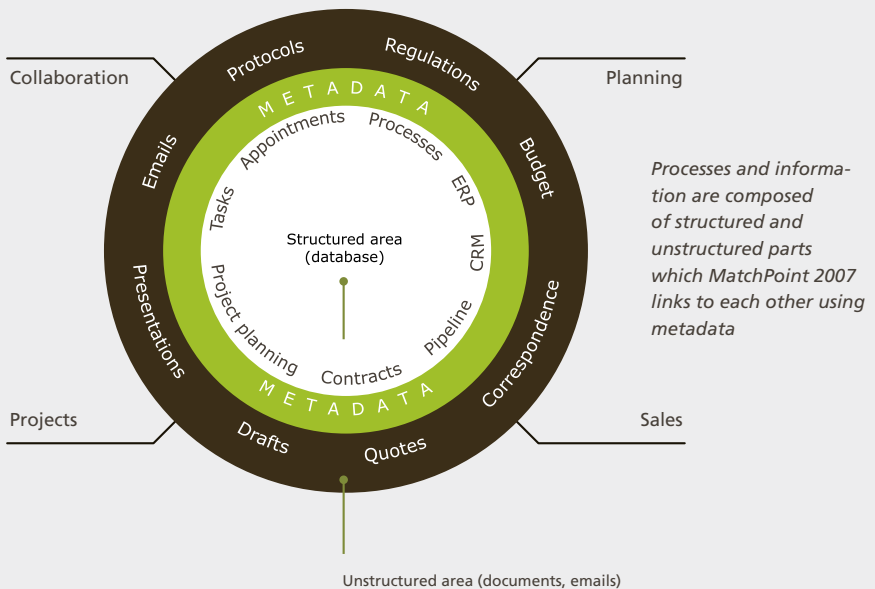
# MatchPoint 2007 means finding instead of searching.

## Relationships are essential:

Relationships and „networking“ in particular are indispensable in business. This also applies to all kinds of data. After all, you can only gradually find information if it has been linked appropriately. MatchPoint 2007 uses existing relations from business applications, allowing you to use them as metadata and search for information iteratively using memory bridges. For example, you can easily find the documents for all your customers in a specific country. To limit your search results, just continue filtering by „drilling down“, a process based on metadata. For example, zoom from country to town and restrict the document type to contracts. MatchPoint 2007 provides a clear selection of all relevant documents in no time at all.

## Processes and information in harmony:

In many important areas such as planning and sales, in projects or quite generally in company communication, your processes are unstructured for long periods with regard to the way you exchange documents. Only individual steps are mapped as clearly specified processes. MatchPoint 2007 fuses these areas together using the metadata model, allowing you to integrate documents and email traffic with your workflows the same way you would do with data from your CRM or a business application.



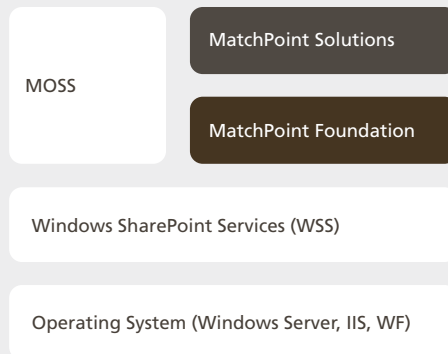
# MatchPoint 2007 gently widens horizons with a touch of magic.

## **From file storage to information platform::**

MatchPoint 2007 is an incremental upgrade to the next generation file server and not a “big bang” implementation of a completely new DMS. With MatchPoint 2007, you no longer have to deal with tedious document analyses and the complexity of conventional document management systems. MatchPoint 2007 provides fully automatic metadata management, applying your metadata to your documents with a minimum of effort. You are able to find your documents much more quickly without having to change anything about the way you work. This limits the time needed for employee training to a few minutes. And because the metadata do not have to be entered first, migration to Match-Point 2007 is quick and painless. Your employees simply move their documents to the new folder structure and MatchPoint 2007 takes care of the rest.

## **A good off-the-shelf solution:**

MatchPoint 2007 is based on SharePoint technology, which is strategically important to Microsoft. You are thus both banking on a solid product and a leading, reliable partner for further development in information management.



*MatchPoint 2007 is based on Windows SharePoint Services and forms the basis for collaboration solutions and their integration in MOSS.*

# The benefits of MatchPoint 2007 at a glance

- Strategic**
  - Company-wide standardised metadata
  - Use of data from business applications in the metadata model
  - Multidimensional, complete views of documents
  - Mapping of the company structure in the metadata
- Tactical**
  - Fastest possible search with complete and exact search results taking account of existing authorisations (security-trimmed)
  - Linking of unstructured information and processes using metadata
  - High-quality automated classification of documents and emails
  - Integration with Office, Outlook, Windows Explorer and all known client applications
  - Minimum modification to established procedures
  - Utilisation of all MOSS and WSS functions
- Operative**
  - Dynamic metadata model: changes are made directly in the leading business application and reflected down to the document level without recreating the index
  - No or hardly any work required from users thanks to autotagging, inheritance and promotion of metadata
  - Only relevant search results that can be filtered and sorted
  - Visual tagging with drag & drop functionality using a simple, application-independent tagging client
  - Hierarchical search with drill-down and drill-through options (e.g. World – Europe – Switzerland – Basel)
  - Simple management thanks to a high degree of integration in the Microsoft platform (Active Directory, SharePoint)
  - Easy migration without complex document analysis and without manual data entry of the metadata

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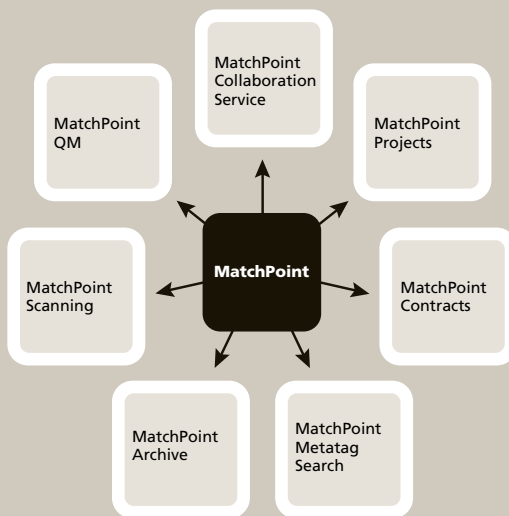
# Our MatchPoint services

With MatchPoint 2007, we do not only provide you with a practical tool to manage your documents but also with a complete solution kit to support specifically all your processes.

**MatchPoint projects** Benefit from our many years of experience of implementing SharePoint in information management projects. Just tell us where you would like to use MatchPoint 2007; we will identify your metadata and define your metadata model. We will also develop the necessary interfaces between your business applications and the metadata model. MatchPoint 2007 integrates seamlessly with your environment and, as a Smart Client application, no installation is required on your employees' workstations.

**Training** Our comprehensive offer includes both training and „train the trainer“ courses for administrators and users. Simply select the optimum form of instruction for your business.

**Operation and support** We can meet all your needs, from software assurance and maintenance to operational support (2nd–3rd level support 24/7) to user support (1st level support during office hours). We are happy to help you find the correct support model for your company.



*MatchPoint 2007 is a common platform designed to support all unstructured processes and the information associated with them*

# All details from A to Z

<b>Metadata model</b>	Mapping of hierarchies
	Mapping of relations
	Management of synonyms and multilingual metadata
	Automatic import of metadata from business applications
	Automatic synchronisation of metadata with the leading systems
	Automatic import of user, group and organisational data from Active Directory
	Automatic update of changed metadata in the index
<b>Metadata allocation</b>	Structural metadata: Automatic multi-level propagation of metadata via directory structures to documents
	Content metadata: Automatic multi-level propagation of metadata via content types to documents
	Related metadata: Automatic allocation of metadata that have a fixed relation to other metadata in the model
	Manual allocation of metadata via application-independent tagging client
	Tagging of folders using the tagging client
	Automatic generation of pretagged folders and folder structures from the metadata model
	Automatic population of site columns with metadata
	Support of mandatory and optional metadata fields
<b>Tagging client</b>	Standardised, application-independent allocation of metadata via an easy-to-use wizard
	Drag & drop saving of documents via Windows Explorer using the SharePoint Web Interface or directly from any client application
	Automatic opening of the tagging client while saving the document
	Allocation of metadata using drag & drop
	Easy metadata selection with type ahead function (find as you type)
	Allocation of metadata to several documents simultaneously
	Automatic prompting of metadata based on the document properties
	Saving of personal metadata sets (personal favourites)
	Publication of metadata sets for other users (global favourites)
	Display of all documents not yet tagged per user
	Display of the last tagged documents per user
	Display of automatically propagated and manually allocated metadata
	Subsequent editing of metadata using the SharePoint Web Interface

**Search** Specific search for documents using metadata  
 Browsing, filtering and adding tags in the search  
 Adding tags in the current search directly from the search results  
 Easy metadata search with type ahead function (find as you type)  
 Combination of several tags using AND or OR links  
 Subsequent deletion of already selected tags from the search  
 Combination of metadata and full text search  
 Restricting the search to a specified time period (only show documents from today / last week / last month)  
 Restricting the search to specified file types  
 Gradual filtering of the search results with additional tags (drill-down)  
 Opening documents and associated folders and editing the metadata directly from the search results  
 Saving of searches (personal favourites)  
 Publication of predefined searches for other users (global favourites)

**Mail Tagging** Storing emails, meeting requests, fax messages, voice mails and other Outlook objects from Outlook 2003 and Outlook 2007  
 Free choice of the destination folder and individual allocation of metadata per storage object or for all objects together (emails and attachments)  
 Renaming of emails and attachments when saving  
 Display of the last destination folder used  
 Automatic marking of saved emails in all Exchange recipient mailboxes and barcoding of email conversations to make saving replies to already tagged emails easier  
 Automatic categorisation of the saved emails using Outlook categories (save pending, saved, barcoded)  
 „One upload only“ function to ensure that several recipients do not save the same email  
 Saving of personal storage locations (favourites)

**Administration** Integration in Web-based applications via iFrames and in Windows applications via WebDAV (drive mapping)  
 Minimal deployment effort due to use of Smart Client technology and the support of Group Policies  
 Document management in standard SharePoint document libraries  
 Mapping of the document life cycle using business rules (publication, archiving, records management)  
 Complete support of the standard SharePoint functions (site columns, content types, versioning, workflows, notification etc.)  
 Complete support of all Office-integrated SharePoint functions such as check out, check in, version history and document workspaces  
 Optional: integration of scanning and OCR solutions to process paper-based documents

