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XCM FAQs & Features

The following are FAQs and Features of Xpiori's XCM Knowledge Management Server. Choose from the links below:

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Discover

Aggregate thousands of electronic documents, including scanned paper originated documents into XCM, to search and discover across an entire scope of information assets.

- Discover documents and document content using free text search, metadata search or combined text and metadata search.
- Use XCM for content/document/knowledge management.
- Use XCM for discovery receipt and evaluation or discovery evaluation and production.
- Search and discover new information added to the system every day.
- Discover both the content and the context of existing information assets.
- Drill into the substance of information assets.

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Organize

Organize information assets into “Research Folders”.

Research Folders preserve the integrity of original documents. Information stored inside of Research Folders can be “mirrored” in multiple folders, allowing replication and reuse without concern of destroying or losing the source document(s).

- Organize documents into assorted Research Folders to build context around various topics or ideas.
- Organize information by creating Research Folders within Research Folders.
- Organize information easily using “drag and drop”.

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Collaborate

Collaborate using folder and individual document level annotation features.

- Create unlimited annotations on both documents and folders.
- Create annotations that are unlimited in length.
- Multiple users can add annotations to collaborate and build knowledge.
- Access XCM at the same time that other users are, discovering, organizing, collaborating and sharing information.
- Collaborate across town or across the world, by accessing the XCM system remotely over a VPN or other protocol.

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Share

Share information with other XCM system users.

- “Check In” and “Check Out” documents.
- Share commentary via annotations.
- Share information by using the XCM “Extract” feature.
- Extract and export information stored in Research Folders to be used in other applications.
- Share access to XCM with remote web access via a VPN or Extranet.

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User Interface

XCM’s user interface is straightforward and easy to use. Program tools and features are conveniently laid out and easy to find. Learn to use the full scope of XCM’s features quickly.

XCM only has a couple of primary screens that users need for discovering, organizing, collaborating and sharing information.

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Appliance Deployment Capability

XCM is provided as an “appliance”. It is simply plugged into the network. XCM automatically copies and migrates information that is designated from existing servers or other sources. XCM automatically keeps track of changes to documents on the network. Searching, managing and storing lots of information is no simple task; but, being a powerful turnkey solution, XCM easily manages the process.

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Easy to Install and Setup

Install XCM in a matter of minutes and quickly begin experiencing the power of XCM. Installing XCM takes less than an hour. Immediately discover, organize, collaborate and share information assets upon installation.

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Multi User Access

Use XCM in a workgroup setting while other users are accessing the system.

XCM can be used by one person and can be used very effectively. However, XCM is best used in a setting with multiple users, such as in a small to medium sized business or corporate workgroup.

Multi user access enables concurrent user access to the information contained in the system. Multiple users can simultaneously discover, organize, collaborate and share information.

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Drag and Drop Interface

View information as familiar file icons and folders. XCM uses the same familiar file system users are accustomed to when moving files and folders on a computer desktop.

Create new documents in any program. XCM recognizes the new file on the system, indexes it, and makes it available for discovery, organization, collaboration and sharing.

Easily drag and drop documents into Research Folders. Computer users are already familiar with drag and drop manipulation of files into folders.

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Smart Repository

XCM is a live source and live archive for the information that comprise a knowledge base. The system aggregates all information into one location for easy access and management.

XCM does not move files from the network; it simply copies the information specified to the system, migrates it into the XCM system, and then tracks changes to new documents or files added to the network.

Seamlessly search and discover the entire scope of information within the repository.

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File Tree Display

See information in a familiar file tree display structure. This provides an intuitive way to see information and manage it.

View files and their relationship to each other by viewing the file tree, and expanding branches of the structure for more detail.

For example, a location on your server > contains a folder > with a subfolder> that contains a file. It's that straightforward.

Don't be forced to learn a new organization structure for information. Information copied from the network is stored and organized in the same manner as on the network. (It looks the same.)

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Background OCR Function

Save money and time when XCM automatically OCRs and indexes documents.

OCR stands for Optical Character Recognition. OCR is the process by which an “image” of text, such as text from a scanned document, fax or PDF, is made readable and searchable by a computer system and turned into actual text that can be searched and manipulated. With XCM, OCR automatically runs in the “background” -- meaning that a user can scan in tens of thousands of pages of printed materials into XCM and the system will automatically OCR each of those pages making them text searchable. (All scanned documents loaded into XCM are automatically made text-searchable.)

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Search Features

Search for information in an assortment variety of ways, using a range of powerful search options. Multiple search features can be combined to affect desired search results.

- Boolean searching (AND, OR, NOT)
- Proximity (WORD w/25 PHRASE)
- Wildcard (SEMI* = SEMICONDUCTOR)
- Stemming (DRIVE = DRIVER, DRIVEN, DRIVING)
- Phonic (“sounds like”)
- Fuzzy (find misspelled words)
- Synonym (words that mean the same thing)
- Metadata Only (find all documents for project #23)
- Combined Text, Metadata and Any combination of features.

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Free Text Search

Search ALL of the text found within EVERY document inside of XCM, including OCR'd documents on the system.

Search for a full sentence, part of a sentence, a phrase, a word or various configurations that best fit the query. XCM will find it -- if it exists -- within hundreds of thousands of files on the system. XCM will list the documents that show an instance of the search, and it will automatically highlight the instance(s) within the document.

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Metadata Management

Manage information using metadata.

Metadata is simply information about information. Every file on a computer already has metadata associated with it. This includes: who the author was, what time or date it was created, what type of file it is, where it is located in the system, etc. (Example, this information can be seen by right clicking on a file and viewing the document or file's "properties".) XCM goes one step further; the system allows users to add their own metadata.

Organize information using metadata or by adding and creating new custom metadata. (Add a project number to a file; assign a subject line, etc.) XCM can search metadata, along with free text searches.

Custom metadata allows users to "describe" their data. Assign multiple metadata descriptions to folders and documents. The same document can be assigned multiple metadata elements. (Example: Assign multiple project numbers to the same document, thus associating it across multiple projects. This ease of management and flexibility allows users to organize information and manage it for a variety of purposes.)

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Combined Full Text and Metadata Search

Search for full text and metadata of documents and folders simultaneously.

XCM allows users to search on the metadata of a file and search the text of all information in the system at the same time; this narrows down search results and makes finding targeted information easier.

Add the same metadata (such as Project Names, Numbers or Type of Information) to groups of files and search ALL files for that metadata to organize and keep track of information.

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Scope Search

Impose practical limits on a search by using the tree structure to limit the scope of a query to an individual document, folder, set of folders, a computer on the network, drive, or other location.

Customize a search query by scoping a search to a specific location and combining search features.

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Research Folders

Create folders that preserve the integrity of original documents called, Research Folders. Information stored inside of Research Folders can be "mirrored" in multiple folders, allowing replication and reuse without concern of destroying or losing the source document(s).

Research Folders are intuitive, yet familiar folders that users can create, manipulate, drag and drop and add information to for organizing information.

Research folders can be annotated.

Create Research Folders within Research Folders.

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File Annotations

Annotate files and folders with commentary.

With file annotations, users can take notes or write a treatise on a specific document. The notes are stored in a separate tab that lives with the document. The file annotations that users create in XCM are also searchable by XCM.

Creating a file annotation on a document allows the user to keep notes that stay with a document. These notes can be used for later reference by their creator or by other users who access the document or folder.

Create multiple annotations. Multiple annotations are easily organized and quickly accessible through two mouse clicks into the file's properties.

Create annotations that are unlimited in length. Annotations can be longer than the document they annotate.

Create annotations using Rich Text Format (RTF). RTF enables users to apply formatting, such as bold, colored text, underlines and more to the text they create in annotations.

Copy and paste pictures into annotations, along with text.

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Remote Access

Access XCM remotely.

XCM was designed from the ground up to be used locally and remotely. Access and use the XCM system over a VPN, Extranet or other remote means and enjoy the same flexibility and access to information when using the system locally.

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