



filedoc

Document Management
and Workflow Automation



CONTROL YOUR INFORMATION BEFORE IT CONTROLS YOU!

INTEGRATED DOCUMENTS AND PROCESSES MANAGEMENT

Document management contributes decisively to a company's performance and reflects its internal organization. The existence of large amounts of information to process, either

internally or externally, raises the likelihood of document losses and increases the difficulty of quickly accessing and, locating them, and of controlling adequately the flows of information.

IMPLEMENTING A WORK FLOW AND DOCUMENT MANAGEMENT SYSTEM CONSTITUTES A DECISIVE FACTOR IN BOOSTING YOUR BUSINESS SINCE IT ENABLES THE COMPANY TO MANAGE ALL UNSTRUCTURED INFORMATION IN ACCORDANCE WITH THE FOLLOWING CONCEPTS:

DEMATERIALIZATION

Digitalization of paper documents turning them into electronic documents that can be classified and assorted according to specific criteria.

STANDARDIZATION

Of processes following always the same procedures thus enabling all company documents to be standardized and classified according to type and entity source.

INDEXING

Labeling and classification of electronic documents. This stage resembles the physical archive but takes advantages of the benefits rendered by the information systems to ensure the integrated management of physical and electronic archives.

WORKFLOW

The definition of the stages a document goes through including publication, approval, distribution, and circulation or filing, thus enabling the control of the flow of the documents.

SEARCH

A browser able to search documents search by content or attributes thus permitting to trace and make any documents available where and when required.

COST REDUCTION

Is originated directly from the increase in productivity which accrues from time savings in searching, forwarding, and managing documents, but also from cost cuts obtained through a reduction in copies and use of storage space.



FILEDOC'S BENEFITS

- Dematerialization of documents and associated processing procedures;
- Automation and standardization of work processes;
- Centralized management of company records;
- Standardization of documents, archiving methods and procedures;
- Swift access and processing of documents;
- Information flow control and security (documents and processes);
- Administrative and process efficiency gains with the corresponding reduction in operational costs;
- Reduction of costs associated with physical storage space as well as with document printing and photocopying;
- Enables efficiency measurement of processes and resources.

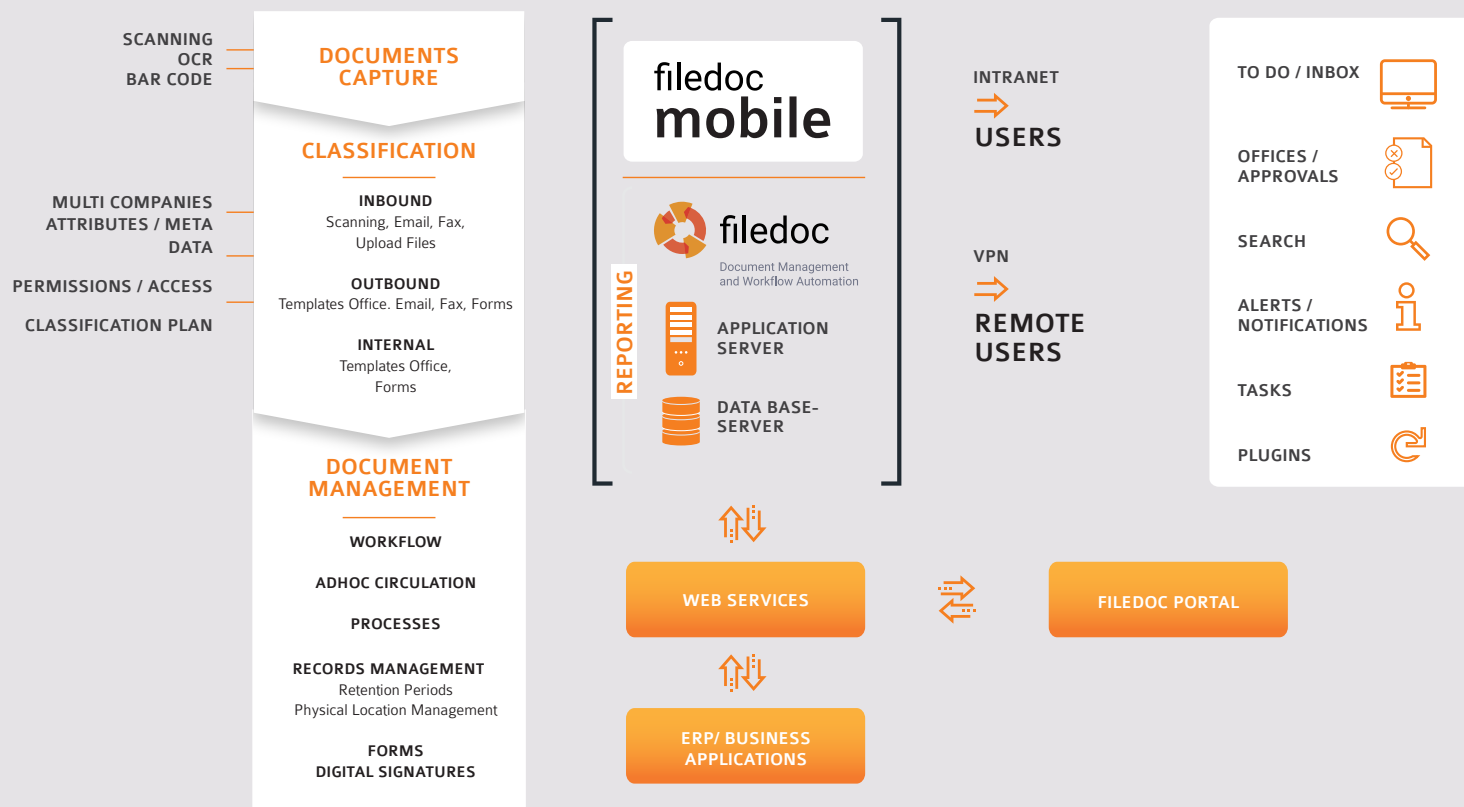
Filedoc is an integrated document management and workflow application which embodies the functionalities of archiving, life cycle management and assignment of documents by process thus enabling dematerialization of business processes information and facilitating decision making.

Developed with Microsoft technology for web environments Filedoc bears a friendly easy to use interface that is easily accessed by any equipment with an internet browser.

Filedoc's aim is to provide a fast, easy and efficient document and process management, thereby enabling at the same time the organization to manage and exercise control over the whole of the information therein.

Filedoc complies with the MoReq2 norms, which lay down the requirements for the development of any electronic document management system.

Implementing Filedoc constitutes an opportunity to review all your internal document management procedures with the support of an integrated, flexible, and technologically advanced system.



MAIN FEATURES

MULTI COMPANY AND MULTI-SITE

For groups of companies that want to have a corporate management of the information related to the subsidiary companies, Filedoc Multi Company allows for an integrated approach while maintaining each company document and process management. Another scenario arises when there is the need to interact with other organizations. When all information flows electronically within an organization there is often the need to rematerialize documents when there is interaction with other organizations. Such way of working, by not allowing for on-line control of processes, reduces efficiency, increases response time and the corresponding costs. Filedoc Multi Site enables various organizations to connect thus fulfilling that need.

ACCESS, AUTHENTICATION AND SECURITY

Access to the system is made through a web browser regardless of the user's location. Authentication is accomplished through login and password or by integration with the organization's network "active directory" employing the "single sign on" concept. Access control to documents is enacted through detailed authorization concept comprising the definition of groups, roles (or jobs or functions) and profiles. This concept ensures that people with different roles, departments, auditors, suppliers, etc. are only allowed to access documents that are assigned to their permission level.

The "log" functionalities make it possible to check who accessed or modified a document and to whom it was sent. The concept of classified document prevents a document to be visualized by anyone but its sender and addressee. Filedoc permits using digital signatures whether they are simple or made through digital clearance certificate such as the one provided by the citizen's identification card thus ensuring document safety and users' authenticity.

ENTITIES AND TASKS

The entities data base must be managed in Filedoc. Each entity is defined by "type" which will determine which fields will make up the register, the various addresses that each entity may have and contacts within it. Tasks are defined like they are defined in Outlook and can be typified and associated to documents or processes. Both contacts and tasks can be synchronized with each user's outlook and thenceforward with any mobile device.

MANAGING OF ALL COMPANY CONTENTS

Filedoc enables a company to register and keep track of any content be it a print document, a file or an email.

DOCUMENTS SCANNING

Within Filedoc documents can be scanned individually or in batch through the use of bar codes that work as document separators. When a document is scanned it is possible to extract information from it using OCR and/or bar codes and then use the information elicited to assign contents to categories and integrate them into an ERP.

Scanned documents can be converted to PDF/A thus paving the way for their content to be searched by key word.

Scanning documents into network files is another option. Filedoc can search and retrieve these documents and store them in its own data base. During the Scanning process and as long as the scanners allow it, it is also possible to print the physical document's entry number and date of registration.

BAR CODES

For capturing and indexing high volumes of documents, you can create automatic indexing triggers activated by reading barcodes. Bar codes should be associated with document lots and may contain metadata such as date, company, document type, registration, workflow, sender, recipient and subject.

DOCUMENT CREATION AND VERSIONS' MANAGEMENT

A number of functionalities which are available in Filedoc enable the creation, editing and life cycle management of documents.

Internal or outbound documents may use the customized templates that are usually made available in Filedoc thus ensuring standardization of document types.

Thence for any user to create a document it is only necessary to select the option register outbound document, choose the document type - template and classify it.

Even after a document has been classified it is possible to edit its registry and enter additional information. Such information may entail that documents are linked to other documents or to one or more processes, or add other documents or emails.

As long as a document is saved in Filedoc in its original format it may be edited at any time. With regard to word documents whenever they are checked-out the application generates another version which is kept available for consultation ensuing check-in. All versions are saved and made available for future consultation.

REGISTERING FILES (MICROSOFT OFFICE, PDF, CAD, ETC.)

Filedoc provides several ways to register documents and/or files on the data base. Aside the already mentioned scanning method it is possible to send any type of file to Filedoc through a Windows' plugin whether it is located in a local folder or in a file server. The Office plugin enables sending a Word, Excel or Outlook file.

All files that are logged to Filedoc maintain their original format.

FORMS MANAGER

Filedoc embodies a forms' manager which gives the application administrator the possibility to generate form types and define the fields for each type of form. The fields can be of the text, numerical, data, multiple choice or combo box types.

It is possible to define, for each field, the number of characters it will accept, if it is multiline, to pre-set the initial value and order.

These forms work as a normal document that are linked to a registration number and may flow Ad Hoc or be inserted in a specific workflow.

MAIL MANAGEMENT

Emails may also be easily registered. There is a plugin within Outlook which permits logging one or more emails in Filedoc. Emails are saved in their original format including the attached files.

Type of document, addressee, sender, subject and date are used to make an automatic assignment of the email.

Filedoc can be made to automatically ascribe an exit number, when an email is sent, so that the number may appear on the subject field enabling the addressee to use it as a reference when replying. Alternatively Filedoc makes available a Webmail solution that allows reading, sending and registering emails in the system.

DOCUMENT CLASSIFICATION/ PROCESSES

After sending a file or email to Filedoc or scanning a document you may classify it employing the previously defined criteria such as type of document, sender, addressee, subject, process it is related to, data, etc.

Documents or processes may also be classified according to a functionally inspired hierarchical structure set to standardize classification codes.

After a document has been classified it is automatically numbered by the system and saved on the data base whence it can be stored and rendered available for consultation through the use of various, pre-set, search filters.

A dossier consists of documents of various types and formats such as letters, faxes, or e-mail files, as well as the entities involved and other files that are associated with it, etc. This feature thus allows an easy and quick distribution in one go of many documents to one or more users.

WORKFLOW AND PROCESSES MANAGEMENT

Filedoc helps to render business and support processes automatic and more efficient.

Filedoc's workflow engine consists of a set of actions and rules that enable you to define, manage and optimize the processes of each organization.

Possible actions include document circulation to one or more users, with or without a mandatory reply, the creation of a specific task, the mandatory association of a document with a process type, template based document and email creation, deadlines, metadata rules or the interaction with other systems, namely ERPs through Web services.

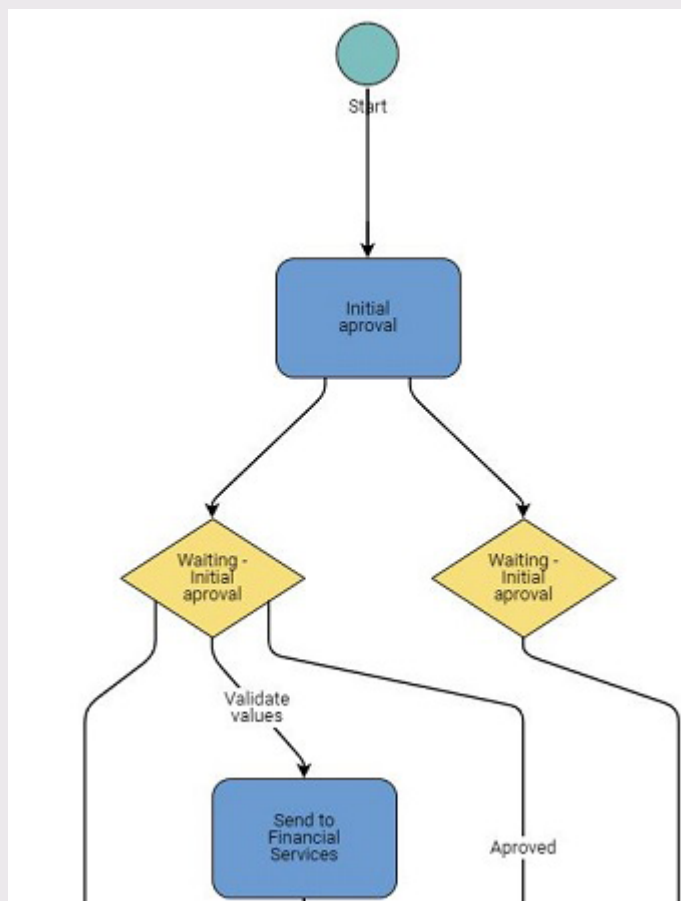
Workflows are controlled through the user's acceptance, rejection or conclusion of a specific action by a user, thereby determining the workflow's next step and to whom it should be addressed.

For each workflow, an awareness email with a computer link allows the user to remotely access the corresponding display information. To control everything that has to do with approval dates, a programmed agent is responsible for the activation of the alarms, as per the Workflow's customization.

Every time that a specific process is not defined, there is the possibility to circulate process in an Ad Hoc way, e.g. the user decides to whom the document will be sent.

Circulation types are customized in the system, and they may inform, request an opinion, or an approval or a signature.

Filedoc's alarm module allows the definition of specific rules in association with metadata - documents, processes or workflows.



REPORTS AND KEY-INDICATORS

Filedoc's base includes a group of reports that allow administrators to obtain key-indicators from the system.

These indicators relate to documents, processes, circulations, workflows, tasks, physical retention periods and digitalization.

Filedoc's available attributes, according to customer's criterion, allow the customization of the data to be obtained.

FILEDOC PORTAL

This module allows the provision of a web portal that communicates with the Filedoc securely via web services.

Filedoc portal allows any user, authorized and with internet access, to interact with the system and namely make approvals and search for documents and / or processes.

FILEDOC WEB SERVICES

The application has included a group of Web Services based Interfaces that allow its integration with innumerable different systems.

Therefore any other third party authorized application can trigger Web Services and read or write in Filedoc data-base, safely and securely.

FILEDOC MOBILE

You can access your documents or processes, or even query them with any mobile equipment.



TECHNICAL CHARACTERISTICS

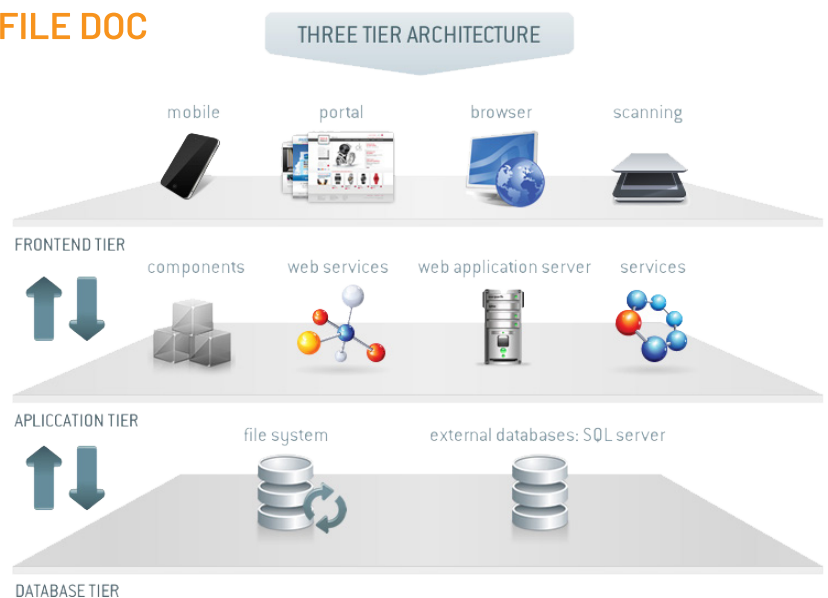
SERVER

- Microsoft Windows 2008 or above;
- Internet Information Services 7.0 or above
- Microsoft SQL Server 2008 or above
- Framework .net 4.5
- TCP/IP Communications Protocol
- Processor XEON (Dual CPU Recommended);
- Memory RAM 16 GB; Hard Drive - Discs 250 GB
- raid 0 or raid 5; Backup Unit on the Server or on the network

CLIENT

- Any Windows or Mac operating system
- Internet Explorer 11.0, Edge, Chrome and Firefox
- Microsoft Office 2003 or above
- I3 with 4 GB RAM (8 GB recommended and 16 GB RAM for scanning stations)

FILE DOC



SOME DOCUMENTS AND ARCHIVING STATISTICS:

On average each employee wastes 12% of his work time looking for documents on the desk or archive.

- ▶ **90%** of the documents we work daily with are mixed up with other documents.
- ▶ **80%** of hand written documents are not looked at anymore.
- ▶ **50%** of all documents on our archives are duplicated or outdated.
- ▶ **30% a 40%** of all physical information records can be immediately digitalized allowing the destruction of the originals.
- ▶ Time wasted on document management represents one the 10 most time consuming activities in any organization.
- ▶ **15%** of documents handled are lost.
- ▶ **7.5%** of all lost documents cannot be retrieved and 3% are wrongly filed.
- ▶ On average each document gets copied 9 times.



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