



# filedoc

Document Management  
and Workflow Automation

## CONTROL YOUR INFORMATION BEFORE IT CONTROLS YOU!

Filedoc is a document and email management software with process automation, installed in thousands of organizations, helping leading organizations manage information more efficiently, ensuring it's secure, usable, and accessible—from any device, at any time, and anywhere.

With thousands of installations in organizations of all types and sizes, this software makes it possible to manage information more efficiently and ensure that it is always secure, compliant, usable and accessible, anytime and anywhere.

Filedoc's intuitive interface allows you to capture, index, process and manage information in all departments.

Choosing Filedoc means ensuring effective management of the information and processes essential to your company's performance, while at the same time helping to shape, streamline and demonstrate your internal organization.



### FILEDOC ADVANTAGES



**Process automation** leads to greater operational efficiency



Centralized and structured **document and email management**



**Artificial intelligence** in knowledge management



**Increased productivity** and service quality, resulting in reduced operational costs



Risk management and **compliance assurance**



**Integration** capabilities with existing systems in organizations

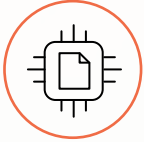


**Process efficiency** evaluation



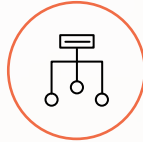
**Secure access** to information through access control mechanisms

Implementing a document and process management system is a decisive factor for any activity, as it allows organizations to manage all information centrally based, on the following concepts :



## SMART INDEXING

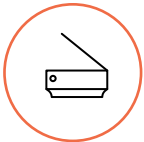
Usage of AI models to automatically classify and categorize documents based on their content.



## WORKFLOW

Workflows are used to automate and dematerialize organizational processes.

A workflow determines who does what, how, and when. Workflows have a defined starting point and consist of several stages that may or may not require human decisions or approvals.



## DEMATERIALIZATION

Digitalization of paper documents, turning them into electronic documents that are classified and made available according to defined criteria.



## STANDARDIZATION

Handling and standardization of documents and processes using the same procedures.



## SEARCH

A search engine capable of finding documents or processes based on their content or attributes, allowing for immediate retrieval and availability when needed,

## WHY CHOOSE FILEDOC ?



Incredible Total Cost of Ownership (TCO)



Proprietary technology with advanced AI features.



powerful and flexible workflow engine, no code required.



Easily adapts to your company's business processes



Out-of-the-box features (no hidden costs).



Various integration capabilities (API).



User-friendly interface.



Strong investment in innovation and quality

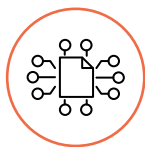
# MAIN FEATURES

Electronic forms simplify, improve, and accelerate data collection. Not only are they immediately available to anyone on any device, but the forms also structure the data so that it can be used to automate processes



## REGISTRATION OF ALL COMPANY CONTENT:

FiledDoc allows registering any organizational content, whether it is a paper document, file, or email.



## INTELLIGENT DOCUMENT PROCESSING (IDP):

Document classification assigns documents to relevant categories for easier management and analysis.

IDP uses artificial intelligence (AI) and machine learning techniques to process structured and unstructured documents, enabling the technology to read and process document content like a human.

This technology can be combined with QR codes, now mandatory on supplier invoices in many countries, ensuring automatic classification in Filedoc.



## EMAIL MANAGEMENT:

Connect to Outlook. Safely register and archive incoming and outgoing emails while automatically triggering new workflows.

You don't have to exit Outlook to register emails. All features are available directly in Outlook:

- Store messages with one click
- Automatically archive emails
- Store only important emails or just the attachment
- Automatically discard duplicate emails
- Automatically classify emails with all necessary data for easy retrieval and workflow start
- Create or add contacts or companies to Filedoc
- Search Filedoc directly in Outlook
- Use corporate email templates managed in Filedoc
- Automatically start workflows based on pre-established rules.



## PROCESS AND WORKFLOW MANAGEMENT:

The Filedoc workflow manager is a tool that allows you to create automated activity workflows through a simple and intuitive interface.

All companies manage their activities based on processes.

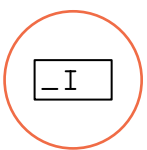
From sales to human resources, from finance to procurement, or from the legal department to the management team, the different areas of a company need to share and access information quickly and efficiently, so that various departments can make the right decisions at the right time.

And when processes, such as order management, employee onboarding, and invoice approval, can be digitized and automated, manual and repetitive tasks are eliminated, allowing all teams to achieve higher levels of productivity and efficiency.

Workflows are used to digitize and automate organizational processes. A workflow determines who performs what, how, and when, with a defined starting point and consisting of several stages that may or may not require human decisions or approvals.

With Filedoc, workflows are fully customizable and can easily adapt to your company's processes, allowing you to set alerts associated with different stages based on deadlines or any other predefined rule.

More than just digitizing and automating processes, Filedoc allows for the extraction of a set of metrics so that each department can evaluate the efficiency of each process and apply measures that lead to continuous improvement.



## ELECTRONIC FORMS:

Filedoc allows you to create forms quickly and flexibly on the web, without the need for programming.

Electronic forms simplify, improve, and speed up data collection. Not only are they immediately available to anyone on any device, but they also allow data to be structured so it can be used to automate processes.

Accurate and structured information collection is essential for process management. The use of electronic forms eliminates the need for paper-based documents, unstructured documents, and the manual handling of data whenever indicators need to be extracted.

The values to be displayed in a specific field of the forms can be pre-defined, either by uploading tables or fed by web services.

And to simplify and accelerate your processes even further, you can combine web forms with workflows, where each completed form triggers a new workflow.



## DOCUMENT CREATION AND VERSIONING:

Filedoc offers a range of features for creating, editing, and managing the document lifecycle.

In the case of internal or outgoing documents, Word templates are generally made available and managed in Filedoc, thus ensuring the standardization of document types.

Any document stored in Filedoc can be edited at any time, and a new version can be created, which becomes available for review. All versions are saved and made available for future reference.



## MULTI-COMPANY:

Manage information from different companies within a business group in a single, centralized repository.



## ACCESS, AUTHENTICATION, AND SECURITY

Access to Filedoc is made via the web through a browser, regardless of the user's physical location. Authentication is performed via login and password or by integrating with the network's Active Directory using the "single sign-on" concept.

Access to documents or processes is controlled through a detailed permissions system, which consists of defining groups, functional groups, roles, and profiles. This way, employees, departments, auditors, suppliers, etc., only have access to the documents corresponding to their authorization level.

The "log" features allow for analyzing who accessed or modified a particular document or file, and also identifying with whom it was shared.

Additionally, Filedoc also allows confidential documents, ensuring that a particular document can only be viewed by its sender and recipient.



## POWERFUL SEARCH:

Filedoc users can have immediate access to documents from any device, anywhere, and at any time. And to help them find the information they need in seconds, they only need to combine document fields with keywords found within the text of the desired documents.



## PENDING TASK MANAGEMENT

Avoid forgetting tasks or deadlines by using the automation capabilities of Filedoc.

In the "pending" section, you can view your tasks grouped by various criteria or define your own filters. For example, reviewing new contracts or approving invoices, taking action on overdue documents, or listing documents pending electronic signature are some of the features of this area.

The "pending" section is automatically updated in real-time, displaying a color code to make it easy and quick to identify overdue documents.



## ELECTRONIC SIGNATURE

Signing documents through an electronic signature ensures their authenticity, legal validity, and compliance with all security requirements.

With the digitization of processes, electronic signatures have become essential in day-to-day business operations.

Electronic signatures, also known as "digital signatures," reduce paper usage and simplify workflows involving document signing, allowing employees, suppliers, and other entities to use them.



## MANAGEMENT REPORTS AND INDICATORS

Filedoc includes the creation of reports, allowing you to extract a set of management and statistical indicators from the system. These indicators may relate to documents, processes, circulations, workflows, tasks, physical document retention periods, and digitizations.

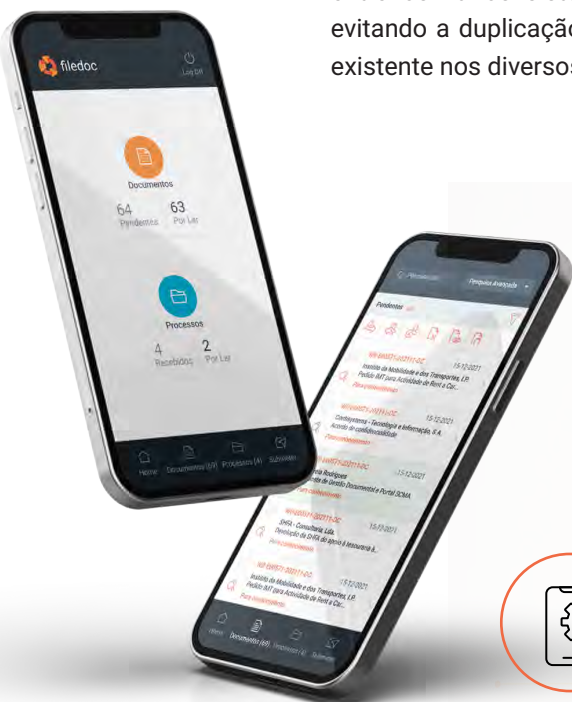


## INTEGRATION CAPABILITIES

O Filedoc foi concebido para ser compatível com os diversos ecossistemas de TI existentes nas organizações, integrando-se perfeitamente com os seus sistemas, arquivos e aplicações existentes, e fornecendo um repositório centralizado e fiável para todos os seus documentos.

O Filedoc também pode ser integrado com hardware, como scanners, dispositivos multi-funções e tablets de assinatura biométrica, para que a conversão do suporte em papel em suporte digital possa ser feito sem qualquer esforço.

A integração com soluções de ERP, CRM, correio eletrónico, portais de equipa, sistemas de RH ou software desenvolvido internamente possibilita uma visão integrada e global entre os vários sistemas, proporcionando uma gestão da informação simplificada, evitando a duplicação de registo de informação e facilitando a partilha de informação existente nos diversos sistemas.



## MOBILITY

Access your documents or pending processes, or conduct searches on them from any mobile device.

Your team's work can be carried out outside the office without the limitations of a traditional workspace. By embracing the flexibility inherent in mobile devices, employees can easily and conveniently initiate a workflow by taking a photo of a document and starting a new process.

Filedoc is available for iOS and Android operating systems.



# TECHNICAL FEATURES OF THE SYSTEM



## SERVER

Microsoft Windows 2014 or later;

Microsoft IIS 10.0 or later; .

.NET Framework 4.8;

Microsoft SQL Server 2014 or later.

XEON CPU

Memory: 16 GB RAM

Storage: 5 GB



## CLIENT

Operating Systems: Windows or Mac

Browser: Edge, Chrome and Firefox

Microsoft Office 2010 or later

8 GB RAM

16 GB RAM for scanning stations

## THREE TIER ARCHITECTURE

