izidocs

Document Management Solution

Description

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1. Executive summary

izidocs Document Management Solution assists companies in managing their information. It can easily import, capture, index, file in specific folders and store all company information, including scanned documents, email and all other electronic document formats. Sophisticated access rights ensure that every user has access only to the appropriate information. Information can also be shared with outside collaborators.
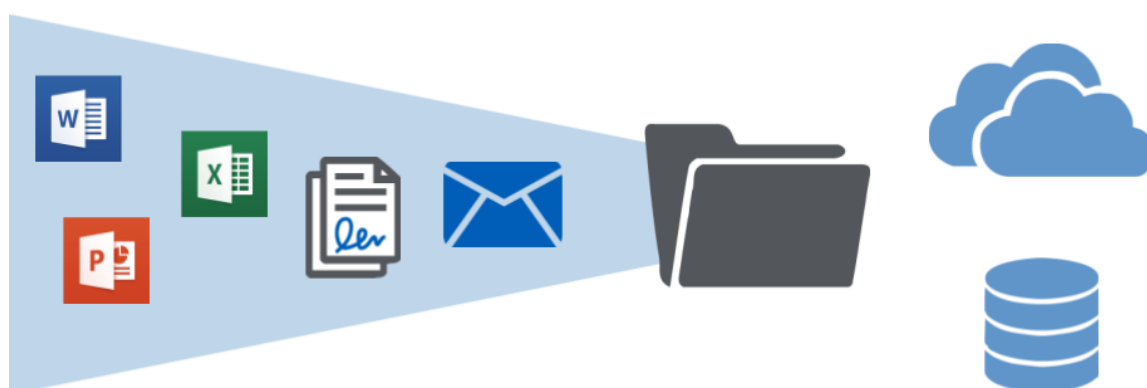
2. Main features

1. **Paper import:** Compatible with all network scanners. Automatic import from scanner and automatic barcode and OCR *(optional)* processing.

2. **Editing/versions:** Editing of all electronic documents *(Word, Excel, etc.)* directly from the browser using native applications installed on PC. All changes to documents are automatically tracked and saved as new document versions. Easy view and access to all previous versions.

3. **Templates:** Document creation from templates. Automatic merging of customer data such as customer name and address during document creation. Addition of barcode allows automated scanning and filing of a signed document as a version of the original word document.

4. **Email:** Outlook integration (drag and drop) to file emails directly from Outlook. Automatic archiving to customer folders by using a unique customer code in the email's subject, or the email addresses included in the email. This auto filing functionality minimises time spent on archiving emails to company folders. Easy access of all emails sent/received by any email address for CRM purposes.

5. **Search:** Intelligent, simple keyword search, across all document properties. Detailed search using from, to, subject, filename, folder *(combinations)*, text in document has/does not have word(s), has attachment *(for email)*, date(s), size, number of pages, file type, creator, last editor.

6. **Compliance:** Keeps a permanent copy of all email and documents. Email is stored independently of user actions *(e.g. delete)* in Outlook. All user actions on documents are recorded. All documents are recoverable even if they are deleted.

7. **Integration:** Integration with other solutions, e.g. Active Directory, banking, ERP, CRM, legal, company administration, etc. *(optional)*

8. **Customer folder structure:** automatic creation of customer or case subfolders such as Agreements, Compliance - KYC, Statements, etc., with appropriate access rights for the various user groups *(optional)*

9. **PDF tools:** Extract pages, remove pages, split document, merge multiple documents to single pdf, convert to B/W, add/replace pages, without the cost of purchasing additional software.

10. **Protect:** Granular security policies with separate create, edit, view, move, delete rights per folder/subfolder. Access rights based on user location can also be defined. Recording of all user actions, encryption of documents in transit, and at rest with multiple keys *(optional)*.

11. **Mobile interface:** search and view folders and documents. Download documents.

3. Functionality

1. General
    a. Interface: Browser based, supports all latest browser versions, including tablets
    b. Mobile interface to search and view folders and documents. Download documents
    c. Customisable: User settings remembered across devices
    d. Filters: Drop down filters enable easy field completion, e.g. folder/subfolder discovery for filing

2. Capture
    a. Folders: One action uploading of entire folder/subfolder/file structures
    b. Electronic files: Easy (drag and drop) uploading of all types of files including MS Office, OpenOffice, PDF, text, image, audio, video, archive
    c. Email: Outlook integration to file (drag and drop) emails directly from Outlook. Capture and retain all emails *(optional or mandatory folder allocation)*. Auto file functionality minimises folder allocation effort
    d. Paper: Compatible with all network scanners, automatic import from scanner, multiple users per scanner
    e. Recognition: Empty page, barcode, and optional Optical Character Recognition *(OCR)* for scanned document and fax separation, processing and indexing. OCR cost is not included in this proposal
    f. Indexing: Indexes text in all electronic files, including MS Office, OpenOffice, PDF, text, emails *(including attachments)*

3. Manage
    a. File: Easy document filing using searchable folder filters. Multiple folders per document. Option to impose filing discipline by specifying minimum acceptable folder/subfolder levels
    b. Document data: Automatically adds known document data such as email from, to, date and subject. Allows user to add/edit document data such as from, to, date, keywords, description, notes. Custom data fields
    c. Editing/Versioning: Editing of documents directly from browser. All changes to documents automatically tracked and saved. Users can upload additional document versions, even of different file type. Easy view and access to all previous versions
    d. Templates: Document creation from templates. Addition of barcode for scanning / processing automation
    e. PDF tools: Extract pages, remove pages, split document, merge multiple documents to single pdf, convert to B/W, add/replace pages, without the cost of purchasing additional software
    f. Search: Intelligent, simple keyword search, across all document properties. Detailed search using from, to, subject, file name, folder *(combinations)*, text in document has/does not have word(s), has attachment *(for email)*, date(s), size, number of pages, file type, creator, last editor, custom data fields
    g. Intranet/portal: Small groups of users can administer content that is made available to large groups of viewers. Custom made portal to display specific

documents and information can be created at an additional cost

4. Retain
    a. Protect: Granular security policies with separate create, edit, view, move, delete rights per folder/subfolder
    b. Destroy: Different retention policies can be implemented in accordance with client legal requirements
    c. Compliance: Keeps a permanent copy of all email sent/received and all documents uploaded. Records all user actions
    d. Encrypt: encrypts all documents in transit, and at rest with multiple keys *(optional)*
    e. Disaster recovery: mirror remote site *(optional)*

5. Integration
    a. WebDAV
    b. CMIS 1.0 (Content Management Interoperability Services)
    c. Web services
    d. HTTP calls
    e. Izidocs API, which can be used to upload documents, view documents, open specific folders, etc.