

# FineDocs 5.3

Enterprise Content Management

FineDocs™



## **FineDocs DMS 5.3 is here!**

The upgraded FineDocs DMS 5.3 is far more optimized and takes document management solution to the next level.

It promises better functionality with cutting edge features while still being user friendly and intuitive. Every new version of FineDocs comes out with host of features designed especially to make Document Management simpler, better and efficient.

### **Highlights**

- ◆ **FineDocs OFFLINE**
- ◆ **Physical Document Management**
- ◆ **Dashboard**
- ◆ **Metadata Browser**
- ◆ **Custom View**
- ◆ **Enhanced PDF Processing**
- ◆ **New UI**

New Release 5.3 is an upgrade containing a collection of exciting features to support integration of technologically advanced document storage and retrieval.

## FineDocs

### OFFLINE

FineDocs **Offline** has been carefully designed to facilitate seamless adoption of FineDocs DMS Web application.

With FineDocs Offline, no internet connectivity is no longer an issue as it now facilitates DMS Users to easily access and manage all their documents in the FineDocs repository even if they are disconnected with the centralized DMS server. Which means loss of productivity associated with downtime and the flexibility desired for remote locations can now be easily handled and achieved.

FineDocs Offline is enabled with a powerful synchronization feature which syncs all metadata, version history and other modification of documents done on the FineDocs Offline with Centralized Server ensuring consistency and integrity.

## Physical Document Management

Leaping a step ahead, FineDocs has extended its capability in managing not only electronic but also non electronic media with the help of its reliable and advanced feature **Physical Document Management**.

Even though there is a fundamental difference in storing electronic and non-electronic media, however, both of them are subject to the same compliance requirements which generates consistency in all forms of documents.

Backed by Enterprise Search, FineDocs Physical Document Management eliminates resistance created when locating important files even from physical location.



*Enhance productivity, manage downtime and generate higher flexibility with FineDocs OFFLINE*

### FineDocs Offline

- Manage Folder and Documents Offline
- Metadata Browser and Custom View
- Versioning
- Synchronize while connected

*Manage Physical Document throughout its lifecycle i.e. Create, Store, Deliver, Retention and Disposal*

### Manage Physical Document

- Physical Storage i.e. Warehouse, Rack, Shelf
- Barcode/Color code labels
- Enterprise Search
- Retention & Disposal



*Information of all the recent activity readily available at a click of a mouse with Dashboard*

## Dashboard

- Latest Created/ Viewed Documents
- My Checkout Documents
- My Pending Work Items

*Enables instant access to Content using Folder and Metadata Treeview in Object Browser*

## Metadata Browser

- Metadata Treeview
- Dynamic Metadata Filter
- Custom Search View and Export
- Faster Retrieval

## Dashboard

FineDocs Dashboard provides DMS users a quick glimpse into recent activity performed on FineDocs without having to run a report.

With FineDocs Dashboard, all latest document updates are available allowing users to perform tasks quicker.

Dashboard brings a role-based view of latest created, modified, and viewed documents along with my checkout documents and my pending to-do work items within the system.

## Metadata Browser

Searching a document becomes faster and easier with another enhanced feature Metadata Browser with Custom Personalized View.

This feature is packed with dynamic Search, View and Filter documents based on metadata in Object Browser to make the document retrieval process a lot easier and accurate.

Moreover, there are wide choices and endless possibilities of defining and tailoring searches based on Folder or Metadata Treeview as per the users' requirements.

## Enhanced PDF Processing

There is no second opinion on the fact that all major companies big or small trust PDF as their preferred document format. FineDocs 5.3 comes with enhanced **PDF Processing** functions where users can Insert Pages in PDF document, Delete Pages from a PDF and even Annotate on the PDF documents.

The system is also now enabled with Document Rendition feature on Document Archival. Any image or Office documents can now be converted into PDF document while Archiving.

# Enhancements - Web

## Download Document with Metadata

Download and Print all metadata along with the document and use the information as cover sheet in case of filing. Multiple Documents can also be downloaded with metadata in a zip.

## Email Alerts on Document Actions

Get notified of all the actions taken on documents and monitor your important content intelligently with Email Alerts. Manage document life cycle well starting from Document Creation to their retiring and archival process.

## Email reminder before Document Expiry

Manage document lifecycle in a smarter way with Email reminder before Document Expiry. Configure Email reminder while setting Retention Policy in Administration.

## Simplified Document Search

Search documents seamlessly with the refined user interface.

## Metadata based duplicate Document Management

Configure metadata to automatically identify duplicate documents at the time of uploading to trash down the document duplicity to 100%.

## Multi-Document upload with Metadata

Index documents with Metadata and Keywords right while uploading from Web interface to save time and effort.

## Auto-Versioning while uploading

Control the document versioning behavior right at the time of uploading through Web Interface. Add document as a version of an existing one or upload as a new renamed document as per the business rules defined in the system.

## Switch Profile after login

Save effort and time to switch between the different profiles i.e. Administrator and User without logging out.

## Document Name length increased to 100 characters

Increased character count up to 100 characters for document name to meet different business requirements.

## Docs Tray is now Favorites

Maintaining pace with the new trends, Docs Tray has now been renamed as Favorites.

## New User Interface (Web)

A gradual shift to New User Interface to make it more intuitive, simple and user-friendly for the users to be able to make complete use of FineDocs 5.3.

# Enhancements - Add-ons

## FineScan

### Enhanced Auto-indexing

Auto-indexing in FineScan improved to make it a lot simple and quick. System now can handle duplicate document names along with unique Path column in the metadata Excel sheet for auto-indexing.

### Metadata based duplicate Document Management

Configure metadata to automatically identify duplicate documents at the time of uploading to trash down the document duplicity to 100%.

### Auto-Versioning while uploading

Control the document versioning behavior right at the time of uploading through Web Interface. Add document as a version of an existing one or upload as a new document as per the business rules defined in the system.

## Office Add-in

### New User Interface in OFFICE Add-in

Improved User Interface in OFFICE Add-in.

### Metadata View in OFFICE Add-in

View all Metadata associated with the documents in Object Browser View of FineDocs OFFICE Add-in Interface.

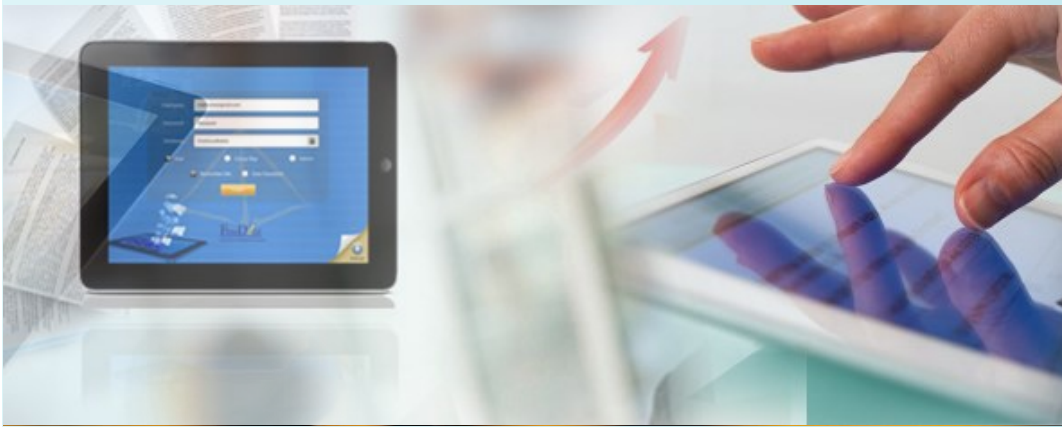
### Indexing in OFFICE Add-in

View Metadata and act on Indexing of MS-Office documents in FineDocs OFFICE Add-in Interface.

## Auto-Upload Watch

### Enhanced Auto-indexing

Auto-indexing in Auto-upload Watcher Service improved to make it a lot simple and quick. System now can handle duplicate document names along with unique Path column in the metadata Excel sheet for auto-indexing.



Empower information access and transform operations through FineDocs ECM solution enabling them manage the complete information lifecycle and business processes for better decision making and enhanced productivity ensuring maximum security and regulatory compliance.

## Upcoming Releases

### FineDocs V5.4

A compatible version with Oracle platform support and Localization support of new features released in FineDocs DMS V5.3 along with some exciting document management features with Advanced Pivot-Reporting and a zero footprint HTML5 Viewer for Office and PDF documents.

**FineDocs 5.3**  
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### FineDocs Mobile Web V1.0

A lightweight express edition of DMS (integrated with existing FineDocs ECM Stack) with great user experience to enable access on Web browser, Tablet and Smartphone using a single application with different views.

### FineDocs eOffice V2.0

A comprehensive eOffice System for document management in Government sectors incorporating e-governance standards and regulatory compliance requirements.

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