

# FineDocs ECM

## Product Overview

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FineDocs Enterprise Content Management (ECM) helps Organizations manage both structured and unstructured content throughout its life cycle, bring and moving it along the respective stages of Creation or Capture, Management, Storage and Delivery to the final stage of its Archival.

FineDocs manages the wealth of Documents, Content, Knowledge and Information with Enterprise Class Applications, Tools and

Technologies.

FineDocs Enterprise Document Management System has all the essential capabilities to control all your information content. FineDocs Platform is built using Service Oriented Architecture (SOA). It has Industry standard security and provides enterprise-class Scalability, Disaster Recovery and Fault Tolerance to manage and control all your information.

FineDocs Platform is a joy to have for the IT Departments as it can be deployed standalone or it can integrate seamlessly with enterprise systems and co-exists with your other Enterprise IT deployments.

What you interface is a composite FineDocs environment accessible just through a web browser or a Mobile App from anywhere and at any given time.

“Manage Content throughout its lifecycle, moving it along the respective stages of Capture, Management, Storage, Delivery to the final stage of its Archival”

## Why FineDocs ECM?

**Document, Content, People and Process:** Capture, Create, Manage, Conserve, Collaborate, Secured Access and Deliver

**Capture:** Document, Content, Knowledge, Information, Email, Fax

and all other Content Types

**Conserve:** Document (No Wear and Tear), Reality Space (Storage), Operational Cost, Labor and Time

**Collaborate:** Document, Work, Process and People

**Deliver:** Faster Decision, Right Content on Right Time, Flexibility and Performance

## Capture

FineDocs Capture Applications, Tools and Technologies offers world class features and functionalities and has matchless Capture engines running at its heart. It also supports distributed environment and delegation of tasks within the environment, which can achieve much faster and precise capture results.

Capture through

- FineDocs Web Archival
- FineScan
- FineDocs Distributed Capture Solution (DCS)
- FineDocs Forms Add-in
- FineDocs Auto-Upload Watch
- FineDocs Email Add-in.
- FineDocs MS-Office Add-in
- FineDocs MS-Outlook Add-in.

## Manage

“Enables organizations meet compliance, mitigate risks and manage records that keep long term business value”

FineDocs with its composite application environment aggregates all the DMS Components together and makes them available to daily solution users through a web browser, for efficiently managing the documents and content across the enterprise environment.

**Classify, Index & Organize :** Advanced Classification and Indexing Scheme assists with modern database technologies help you achieve consistent organization and fast retrieval of unstructured content.

**Manage Document, Content & Library:** Allows you easy and efficient management of content to successfully execute

the daily tasks of document management.

**Search, Find & Subscribe :** You decide! View the easily accessible Document, Content, Folder OR Search them with a Powerful FineDocs Crawler. Subscribe to the information and get the always synchronized up-to-date information on your dashboard.

**Configure :** A great deal of effort has been put to simplify the most complex task of configuration. As a smart system it lets administrator automate most of administration tasks through configuration.

**Audit, Report & Control :** Optimum utilization of resources is the primary objective of any organization and FineDocs helps you achieve the same through a robust Dashboard, Audit and Report features that allows managers to keep track of each and every activity with extensive audit of Users, Functions and Business Workflows.

**Localization :** FineDocs supports localization with English, Hindi and Arabic language support. All ECM product components that are visible to the users and the data managed are localized.

# Classify, Index & Organize

Every organization, large or small, with or without electronic DMS, has its own methods of structuring its indexing. You can map the existing method and at the same time you should take care of best practices of indexing. This will help you prevent rethinking and will make your life easier.

## DataClass and Descriptor Metadata for Indexing

DataClass is a set of Indexes or Metadata that can be associated with the Documents or Folders for providing unique identity to them. In FineDocs DataClass, Descriptors and Global Descriptors are used for indexing Documents as well as Folders.

## Indexing Online

Online Indexing feature allows the User to perform indexing on Document batches uploaded into FineDocs. Document batches can be created using FineDocs Web or FineScan windows application.

## Indexing Offline

Offline Indexing allows to perform indexing on Document batches using FineScan offline mode. Define Template creating DataClass and Descriptors offline and index the documents before uploading to FineDocs Server.

## Indexing Documents

Document Indexing feature allows the User to perform indexing on Documents using FineDocs Web interface. In the Document Viewer or Modify Document module, user can index or re-index any documents using DataClass and descriptors. Page level indexing is also available to index individual document pages.

## Automatic Indexing

Automatic Document Indexing feature allows to perform indexing on Documents based on any configured data lookup. Data source can be any RDBMS i.e. MS-Sql server, Oracle or CSV file, Excel sheet and MS-Access.

## Indexing Folders

Folder Indexing feature allows the User to perform indexing on Folder.

In the Object Brower or Administration module, user can index or re-index any folder using DataClass and descriptors.

Feature available in

- FineDocs Web
- FineScan
- FineDocs Auto-upload Watch

**“Advanced Classification and Indexing Scheme assists with modern database technologies help you achieve consistent organization and fast retrieval of unstructured content”**

# Manage

## Manage Document

Users can perform the following Document level operations based on Privileges and certain conditions.

## Modify Document

Modify Document option allows the following document level functions :

- Rename a Document
- Move Document
- Re-Index Document
- Edit Keywords, Notes
- Delete Page(s) of Document
- Replace Page(s) of Document
- Append Page(s) of Document
- Merge two Documents

## Move Document

Move Document option allows the document move from one folder to another folder within same cabinet or different.

“Allows you easy and efficient management of content to successfully execute the daily tasks of document management”

## Delete Document

Delete Document option allows the document to be deleted and move to Trash. From Trash the document can be restored to the same path or removed permanently.

## Download Document

Download option allows a User to download the selected Document(s) to local machine.

## Copy Document

Copy feature allows to copy the Document from selected Folder to another Folder along with indexes and notes.

## Set Password

This feature allows User to set password on a Document protecting a Document from unauthorized access.

## Checkin Checkout & Version

Checkout is an act of saving a selected Document(s) into local for editing purposes. When a Document is checked out, it is locked to prevent updates from other Users. Document when checked in is saved with a version, thus a version of Document is created. Undo checkout feature allows a User to rollback the Document to its normal status.

## Link

Link feature allows to Link a Document with the other Documents for cross-referencing.

## Mail Document

This option allows User to mail the selected Document from FineDocs.

## Edit Document

User can edit the MS-Office Documents and Text Documents using this feature. MS-Office document can be edited using FineDocs MS-Office Add-ins while Text document can be edited online through the FineDocs Web interface

## Manage Folder

Folder level option has the options to work on Folders. Options are available to create, modify and delete Folders apart from several other options. Folder level options and functionalities:

- Create Folder
- Modify Folder
- Cut/Move Folder
- Delete Folder
- Split & Merge Folder

## Search

FineDocs Search helps the User to find Content using various search criteria/filters. A searching method can also be saved for future use. Search-Filters help reduce clutter and get you more precise and accurate result.

Content Search allows the User to search for a Document using following filters.

### General Search

- Document Path
- Document/Folder Name
- Created by
- Modified by
- Document Format
- Keywords

### Index Search

Index search allows the User to search for a particular Document on the basis of their DataClass and Descriptors.

### Full Text Search

Full text Search retrieves documents based on the text present inside the document content.

### Hit-Highlight

A searched word in an image document is highlighted at all

the instances in the Document.

### Date Search

This option allows the User to perform a search for a Document on the basis of the creation or modification dates or date range selected by the User.

### Note Search

This option allows the User to perform a search for a Document on the basis of the notes entered by the User.

### Query Search

This option allows User to add and save queries and retrieve data based on already saved queries. Queries can be saved as Global or personalized.

### Enterprise Search

FineDocs provides a comprehensive Enterprise Search solution with a unified interface, enabling users to easily locate and instant access to contents from centralized repository of FineDocs. This is intended to have a unified access to multiple information sources regardless of file type, format

or location with full security enforcement. Source of the information are all acquiring locations of FineDocs ECM i.e. FineScan, Auto-upload Watcher, Distributed Capture, Email Capture, Fax Capture and uploaded content and records on DMS Web.

### Document Viewer

FineDocs supports powerful Document Viewer supports multiple image formats along with born digital document, audio, video clips as well as e-docs. This module allows the User to view the Document in a viewer where the Document is displayed on the right panel while its properties comprising of DataClass, Metadata, Keywords and notes are viewed on the left panel.

### Universal Viewer

This module is intended to convert any office and PDF documents to image and view on the Document Viewer. The DMS users do not need the native application installed on their client machine to view the document.

## Reports

### MIS Reports

MIS Reports is useful to keep track of all activities being done using FineDocs. The activities can be monitored for following levels.

- User
- Folder
- Document
- Flow

### Audit Trails

The Audit Trails allows the user to get an audit report. This report contains information of user's activity with the FineDocs. Reports can be generated on any specified date range, on selected activity and selected users. Options available are :

- User Log
- Group
- Cabinet
- Folder
- DataClass
- Document
- Flow

## Collaborate

FineDocs has been designed to be collaborative. FineDocs Platform empowers users with excellent collaboration abilities with cross-geography access, multi-user concurrency, collaboration through emails, chat and whiteboard in portal.

FineDocs has also got a Dedicated Workflow module with host of features and functionalities that help move documents throughout Work Process and hence making process management more effective, efficient and adoptable to change.

- Sequential, Flexible and Parallel Routes with Form associated
- Delegation of tasks based on roles
- Automated Business Rules and Document Routing
- Diversion and Escalation mechanism
- Notifications and Alarm

### Define Workflow

In FineDocs, Flow is a mechanism whereby the flow of Document takes place from one person (User/Actor) to another. Different Routes (Flexible or Sequential) can be defined on which Document will travel. A Route is constituted of User/Actor, thus it is User(s) who Initiate the Flow and becomes participants (Actors) in the Route. User/Actor/ can attach documents, messages and notes with a Document Flow.

### Sequential and Flexible

#### Route

While creating a Flow you require a Route (Sequential or Flexible), on this Route flow of Document takes place when this Flow is used by a User (Initiator).

### Escalation Rules

Escalation Rules can be set in the Sequential and Flexible route. At the time of route creation, enter Time Allotted for the work step. Allotted time can be selected from

Days, Hours and Minutes. You can configure a condition whereby if the Allotted Time exceeds at a user's end automated action is performed itself by the FineDocs. The options available are Forward to any selected user OR forward to Next user in that route. The next User will get the reminder about the exceeding of allotted time OR auto-forward the Flow when allotted time exceeds. Escalation Notification is available through Email also.

### Notification

Notification option allows the Users of FineDocs to view a Notification messages from another User or send Notification to other Users of FineDocs.

### Alarm

An Alarm notifies a User about modifications done on Folder, Document or Flow. Folder level and Document level alarm are configurable.

“Enables Organizations to completely map and automate their Work-Processes and lets handle frequent changes in the process with advanced, robust and agile solution”

# Archival

Empowered with the modern technology, now, you can reclaim city-centered costly office spaces and get rid of document warehouses, which cost you dearly. FineDocs DMS supports a secure, controlled and structured storage on Online as well as Offline medium. With Enterprise-Class Scalability and high availability it enables you to simplify storage management, comply with corporate or regulatory mandates, maximize efficiency and minimize cost of deployment and ownership without sacrificing application performance or data protection.

- Storage on Online media - SAN, NAS, RAID Server
- Preserve on long term storage media - Optical Disk, Magnetic Tape, Microfilm
- Multiple Image Server support in distributed environment
- Auto-Archival of Expired Documents
- Archive on Solid-state storage - CD or DVD with

## Auto-run Search application

Document Archiving is the storage or preservation of information. Archiving has become a critical component of information governance practices.

FineDocs offers a wide range of products and features for documents digitization and paperless office and FineDocs Archival System is one of them. FineDocs Archival delivers the complete document solution, now and future, ensuring regulatory compliance that necessitate the retention of information.

FineDocs Archive is an efficient, secure and flexible archiving solution designed to address the document retention needs of enterprises. Its long-term storage and Archival capabilities can handle all types of unstructured data in a centralized repository, making it easier to manage, decreases storage complexity providing cost-effective solution that helps you to

comply with governance or regulatory requirements.

## Online Archival

An Online Archival Solution archives active content from FineDocs Storage.

- Provision to Archive a complete Cabinet Repository or a specific folder or a set of folders.
- Easy to use graphical user interface for Document Archival.

Archive option enables Users to archive Documents from the Server into the hard drive of the User’s local machine or in the secondary storage. When a Document is archived the archival process maintains the same storage structure (Cabinets and Folders) for the Documents as on server. Archive option is enabled only for Administrator logged in through User’s Profile.

## Retention Policy

FineDocs DMS helps you classify, archive and preserve Document Records. It also helps manage disposal of useless records, that too in an automated way. Thus Retention Policy is nothing

but a way to manage the life-cycle of Document-Records.

## Retention Rules

In order to create a policy you first name it, define retention and disposal period and base it on Creation Date or Planned Date (Descriptor Value), configure Expiry Notification in the field provided i.e. number of days.

## Offline Archival

- Auto-Archival of content based on set retention rules configured on repository
- Retention policies are configured according to Content creation/ modification date, document type or metadata to control what content need to be archived.
- Auto Run-CD - Enables easy search on CD or DVD and locates archived documents across hierarchical repository.

# Security & Control

The FINEDOCS security architecture is organized along two dimensions – application level security and system level security. Application level security is handled with proactively controlling access to FINEDOCS’s features, functionalities, and data implementing the user privileges.

In contrast, system level security is handled with controlling access to the system in the first place. An overview of both of these dimensions is provided below.

## FINEDOCS Application Level Security

Tiered security is implemented in the application level.

### Tier 1 – Authentication

**Login – Credential based** i.e. FineDocs User id / Password based Authentication

### LDAP Authentication

- Integration with Directory Services for user authentication to ensure maximum security
- Synchronizes with directory service for user/group information
- Single sign-on

### Tier 2 - Privileges

The FINEDOCS application level security will utilize role-based (level) security architecture. Roles, and the capabilities associated with each role, will be formally documented in the FineDocs Access Criteria. Four different levels (roles) will be there in the system i.e. Superuser (most privileged user, default user), Administrator, Group Manager and normal user.

Superuser - All privileges (by default assigned)

Administrator - All privileges (by default assigned) except creating Superuser

Group Manager - All Privileges as assigned by Administrator

Normal User - All User level Privileges as assigned by Administrator or Group Manager

### Tier 3 – Data Security

#### 1. Data Security

- Validated input for length, range, format, and type using constrain, reject, and sanitize principles. Output is encoded wherever required.
- Client-side validation as well as server-side validation is implemented.
- Sensitive system or application information is not revealed in any alert or notification messages.
- Session timeout is reduced.

#### 2. Document Level 1 security

##### Cryptography

- In FineDocs, AES (Advanced Encryption Standard) is used to encrypt Document and User Credential (password).
- Encrypted Document Converted into common format (.dat)

#### 3. Document Level 2 security

- Password Protected Document (user defined)
- Document Password (user defined) - Document Password is encrypted and then it is stored in Database.





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[www.finedocs.com](http://www.finedocs.com)

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## FineDocs ECM - Products

### Featured

- ◆ FineDocs DMS
- ◆ FineFlow BPM
- ◆ FineDocs ECM Portal
- ◆ FineDocs Mobile
- ◆ FineDocs HRMS
- ◆ FineScan
- ◆ FineDocs DCS
- ◆ FineDocs Offline
- ◆ FineDocs Form Processing
- ◆ FineDocs Auto-upload Watch
- ◆ FineDocs MS-Office Add-in

- ◆ FineDocs MS-Outlook Add-in
- ◆ FineDocs Document Archival
- ◆ FineDocs Email Archival
- ◆ FineDocs Universal Viewer

### Solution

- ◆ FineDocs e-Office
- ◆ FineDocs e-DAK Management
- ◆ FineDocs Barcode Based File Tracking System
- ◆ FineDocs Legal Case Management System

### Integration

- ◆ FineDocs SharePoint Connector
- ◆ FineDocs SAP Connector