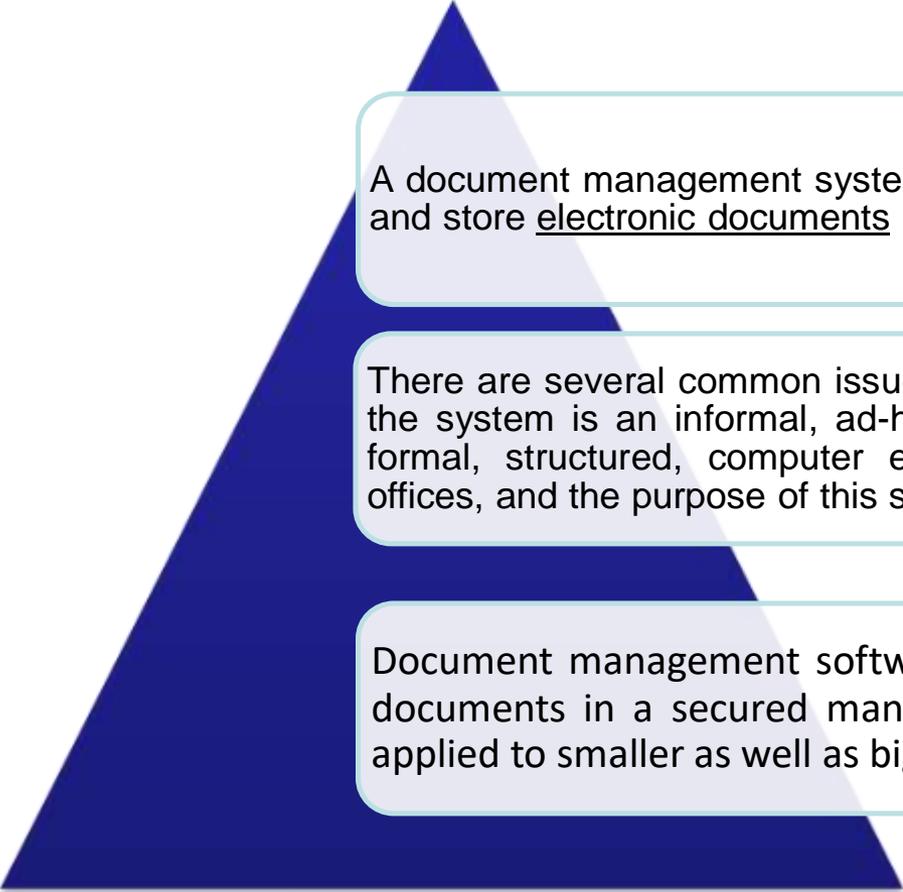# EasyDocuments

Centralized | Secure | Intuitive
Document Management System

WHAT IS DOCUMENT MANAGEMENT SYSTEM?

A document management system (DMS) is a set of computer programs used to track and store <u>electronic documents</u> and/or <u>images</u> of paper documents.
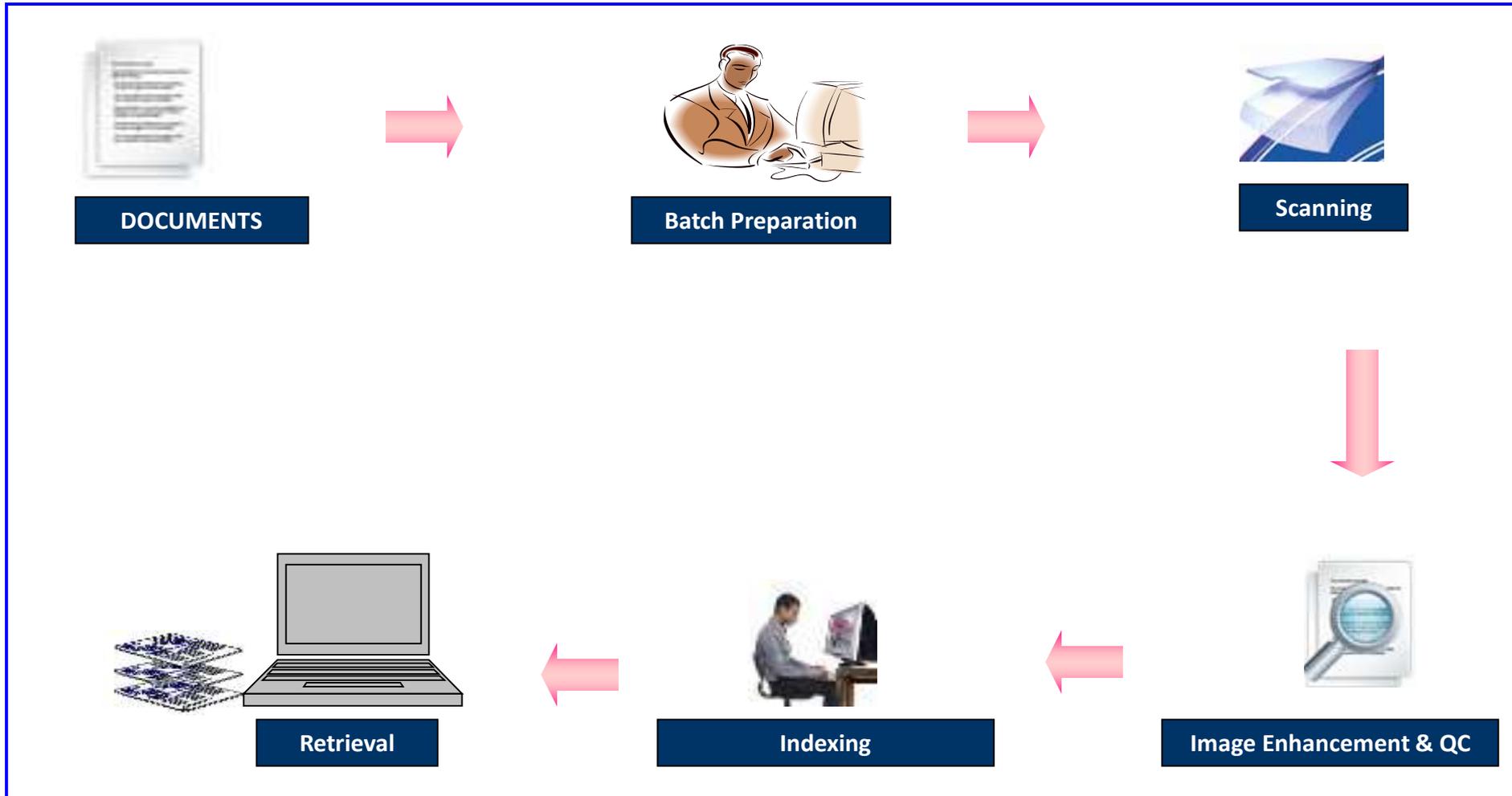
There are several common issues that are involved in managing documents, whether the system is an informal, ad-hoc, paper-based method for one person or if it is a formal, structured, computer enhanced system for many people across multiple offices, and the purpose of this system is to handle these issues in an efficient manner.

Document management software that lets your organization manage and share documents in a secured manner. This system has a wider scope which can be applied to smaller as well as big organization.

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Why Document Management Systems

1. Easy web based interface–intuitive management of documents for easy retrieval

2. Virtual File System – Replace shared drives and offer the same interface

3. Workflow Integration– Process consistency by allowing you define rules, workflows etc. throughout the organization

4. Centralized Electronic cabinets to easily manage documents

5. Security and user management with users, groups and roles

6. Auditing – Who created, who updated, when created, when updated

7. Tagging – Easy tagging of the documents to effortlessly retrieve the documents when you need it.

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PROCESS FLOW

DOCUMENTS

Batch Preparation

Scanning

Retrieval

Indexing

Image Enhancement & QC

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FEATURES – Centralized and Secure Access

Secure Log in based access throughout the organization

FEATURES – Centralized and Structured Document Library

1. **Centralized Electronic cabinets to easily manage and retrieve the documents.**

2. **Fully customizable folder structure to easily categorize each types of documents**

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FEATURES – UPLOADING AND TAGGING OF DOCUMENTS

Upload Document

Folder Name :

Employee Name : Tiru Jogu

Folder Path : D:\Tiru\2013\Mar\WebEdms\WebEdmsLates_30Jan2013\Document I

Document : [Choose File] No file chosen

Description : Partners Agreement 2012

Comment : Project Agreement between ABC and CBS corporation 2012

Tag 1 : ABC

Tag 2 : CBS

Tag 3 : Agreement

Tag 4 :

Tag 5 :

[Upload] [Reset]

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FEATURES – DATA RETRIEVAL / DOCUMENT SEARCH

Data Retrieval

Search: [   ]

Document Type : [AGM MOM ▼]   [**Search**]

Document Name	Document Type	Uploaded By	Date	Status	Description
AGMMinutes2011.pdf	AGM MOM	Tiru Jogu	09-04-2013	Uploaded	Annual General meeting notes 2011
AGMMinutes2012.pdf	AGM MOM	Tiru Jogu	09-04-2013	Uploaded	AGM notes 2012

1. Completely customizable search parameters to suit your requirements

2. Search by type of documents.

3. Search by name or tag of the document to retrieve more specific documents.

4. Get a brief description, date uploaded, status and document type to get a quick snap shot of documents.

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FEATURES – ADMIN SETUP FOR EASY CONFIGURATION

Setup

Employee Setup
Click here to manage the employee information. Here you can add new employees, edit/delete existing information in the system.

Folder Setup
Click here to manage all folders in the system. Here you can arrange the folder hierarchy, add new folder \ sub folder and manage folder permissions.

Menu Security Access
Please click here to manage the user roles in the system. Here you can create new roles, edit/delete existing roles.

Sub Folder Setup
Click here to manage all sub folders in the system. Here you can arrange the sub folder hierarchy..

Change Password
Please click here to change the password . Here user can change his password.

Folder Access
Click here to setup the acesss to the folders. Here you can edit/delete the permissons for folder

Approval Setup
Click here to give approval access of all uploaded or scanned documents in sub folders of main folder to the employees.

Department
Please click here to create and update or delete the departments.

Designation
Please click here to create and update or delete the designations.

Centralized Setup screen for administrators to create folder structure, user management, folder access, workflow setup and security access

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FEATURES – COMPLETE AUDIT LOG REPORT

Audit Log Report

Screen	Transaction Type	Date	Employee Name	Document
Upload	Document upload	1/1/2013	Ramesh Yelanki	Agreement.pdf
Update	User Information	2/1/2013	Amit Makwana	-
Upload	Document Upload	2/1/2012	Ramesh Yelanki	Circular.pdf
Folder Access	Save	2/1/2013	Amit Makwana	
Data Retrieval	Search	2/1/2013	Carl Cooper	
Approval	Document Approval	2/1/2013	P V Jose	Agreement.pdf

Complete Audit Log to give you clear picture of Who created, who updated, when created, when updated.

Thank You

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