

DIGITAL ARCHIVING

(Electronic Document Management System)

FUNCTIONAL SCOPE

DTS-DA



ACCESS TO YOUR DOCUMENTS

ANYTIME/EVERYWARE

Differences between file system and electronic document management system.

Most common solution for document management in an organization is a shared disk in the network, with built-in structure of directories in which digitalized documents are written.

This is a scenario in which problems are raised and it is not effective because the usage of file system has its limitations:

- Structure of directories is crucial for the document search. You can search also by file name (if you know it 😊)
- Credentials management for the file system depend on defining the rights for each user in a common domain of the IT infrastructure, which leads to the risk that some data won't be visible, or will be visible to users.
- Competitive access for documents can't be regulated nor organized in cases if a redaction is needed simultaneously from several employees.
- Management of document's version is done artificially by general convention and organization. Chronology changes are not tracked and ordered for documents.
- Interactions between different workgroups are not supported and communication should be done by emails or other channels.
- Logical relations are not made between documents and group of documents are formed based on logical principals.
- Track changes for documents are minimal.
- Working processes and clear rules for interaction between users is not possible to be organized.

Advantages when using DTS-DA Electronic Document Management System:

- Management of Document's categories via pre-defined classification scheme with meta-data, which helps to their search.
- Management of pre-approved working processes for defined documents as: project-> approved-> released document.
- Automatic version management and access to the old version of documents.
- Powerful engine searching tools – name, keyword and detailed search.
- Management of the rights for access – to read, write, delete documents or via parameters to participate in workflow process.

For users and group users:

- In the documents, you can insert note and comment section.
- Task coordination between different workgroups.
- Internet document access either by browser or local network.
- Track changes by user with log file.
- Association of a document by criteria.
- Grant exclusive rights to edit and modify the document – lock, check-in and check-out.

User's roles and groups

DTS-DA gives you the opportunity to manage users and user groups. You can grant roles – User, Admin or Guest. The “User” is owner of the document and directory, which he has created. He can grant access to other users or groups of users. You are able to read only the document and have access to pre-defined directories when “Guest” access is granted.

“Administrator” access grants you rights to each and every document and directory. Users can be part of different groups. Supervisors with specific rights are able to manage list of people, which are emailed and other specific archive functions.

Archiving documents

DTS-DA support files and folders, but also gives you more opportunities:

- Meta-data storage and document characteristics – author, key words, description, comments and so on.
- Direct access to a document, visualized in a window.
- You can manage files and folders locally by drag and drop function to transfer data from local disk to digital archive.

Documents are much more than files!

By managing meta-data, one document can be associated with another, deadlines for storage can be set and document life cycle can be managed until its status is released. When archiving a document you can define its life cycle. You can change its validity date anytime. Only archive administrator is able to view a document with “expired” status.

Documents are not deleted!

Access to documents are defined on user or group level. This function is for documents, which are public viewable and may be shared outside the organization without any restrictions.

Version management

Each document has more than one version. Each change in the document creates next version. All versions are stored and may be recovered on the place where the last version was. By default, digital archive offers last document version.

Version number is guaranteed. If you open already edited document, which has been opened before, the digital archive will start the new version automatically.

The Search

The search is very simple and easy. If you are using meta-data as an owner, name, category, comments and so on, the archive will suggest all relative documents by search. You can filter to search by "**!xxx**" or "**xxx!**" or "**!xxx!**". You can filter by document status, creation date or expiry date.

Full text search

PDF, Word, Excel documents are indexing using OCR technology and after this a search can be performed in the body of the document.

Files attached and correlations.

You can attach more information to a single document – photos, video, audio and so on.

Correlations are built between documents and archive in a logical principal. Correlations are public or hidden for users. Each document is associated numerous times in logical relations.

Work processes and workgroups

DTS-DA uses mechanism to notified specific rights users, when documents or folders are updated. User can subscribe personally to notifications list. He has access to review all list for notifications.

DTS-DA offers graphic interface for work process administration, in which you can define "status", "flow" and "contractors". Sub-processes may be defined in work process common sense. There is

distinguished area in the user interface, for which you are able to track the status of all documents and users, which work on defined task.

Support and reports

Administration of **DTS-DA** includes renewal functions, corrections or reconstructions of document indexes in the archive, also statistical report for its usage.

Additional functionalities

DTS-DA uses additional options for document management – categories and parameters.

The archive administrator has the right to modify files and folders by categories and parameters. One or more parameters are associated to a specific type of document. For example: "invoices" category and "company name" parameters, "VAT", "address" and so on. Attaching document to

a category will associate automatically parameters for this category. This mechanism reduces document search in the archive and also gives you suggestions.

Each parameter is a key to ERP system, which automatically generates archive documents.

Any directory can be associated to category. Sub-directories and their files automatically adopt the same categories. This is rationality in structure file organization for files and documents.

The system administrator grants categories to directories and files depending corporate needs.

Document loading

Mass upload of documentation let's you upload multiple files in one compressed folder.

The process is recorded in log file, which is easily traceable for each file.

A file can be exported in .pdf format. This way the documents are converted in pictures, which is not editable.

DTS-DA supports interfaces using "web services". Using these web services, processes for automatic view, download, erase, email integration are formed.

Digital world transformation

Using **DTS-DA** services you can expect continuity for important business processes:

- Worldwide access;
- Mobile access;
- 24/7 service for download of information;
- Dynamic access for authorized users to defined documents;
- Sending documents to employees by email;
- High quality technology linked to continuity demands for each process

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