E-File
D M S
Suite

STANDARD FEATURES

SINGLE CAPTURE

- **Scan** any physical document in E-File using any type of scanners (flatbed, ADF, BW, Color...)
- **Import** any electronic document in E-File (MS Office, PDF, Autocad,...).
- **Manual indexing** Index documents by typing the field values manually.
- **Save indexes** only without file(s) (for later scanning or centralized scanning).
- **Retain previous values** For faster indexing, retain previous metadata values.
- **Zone OCR indexing** Select any part of the scanned document, convert it to text, and transfer it to the relevant index field, increasing the indexing speed.

SEARCH

- **Simple Index Search** Search using a single index or combination of indexes, including index values, operator, creation date and last modification date.
- **Virtual folders browsing** Define virtual folders based on specific indexes hierarchy, and access their content in the built-in tree-like viewer.
- **Custom search** Simple, parametrizable search interface for retrieval users.

VIEW

- **View files (E-File viewer)** View image files in the integrated viewer that offers full-page view, thumbnails view, combined view, adding pages, rotating pages, deleting a page, zooming in\out, navigating between page. Non image files open in their native applications.
- **View annotations** View the document history including all versions and users notes.
- **View notes** by different users.
- **View versions history** View the document's history including all versions and users notes.
- **View linked documents** View a list of all linked documents and open them if needed.
- **View document info** View complementary document info such as capture/modification operator(s), date and station.
- **View tracking** Track the document status in case it was routed through the Task Manager.
- **View all** retrieved files as one document.
- **Tabular view** View a document with different partitions (ex: credit file) in a tabular view.

SECURITY

- **Access rights** Detailed access rights can be granted/denied to specific users on specific documents.
- **Actions rights** An extensive list of actions can be granted/denied to specific users and groups.
- **Deletion of documents** Delete selected document(s) by sending them to the controlled recycle bin.
- **Audit trail** Show a full detailed list of actions performed on document(s). Ex: created, modified, viewed, deleted, purged...
- **Security reports** Generate reports by user, by role, by profile,...
- **Security on annotations** Annotations on image files can be assigned specific security attributes.
- **Scheduled backup** Simple backup procedure from within E-File, without having any knowledge in MS-SQL server.
- **Encryption** Documents can be encrypted and only be opened from E-File.

OTHERS

- **Send document by email** Send a selected document with/without its attachment(s) by email.
- **Version control /check out/new version**"Check out" documents, edit them, "Check" them back "in", add notes and keep document history. Create new version when a document has been modified.
- **Link documents together** Link related documents together through a simple procedure.
- **Add annotations on images** Annotate pages (line, note, highlight, ...) and set security rights for each annotation. Mask sensitive information from selected users.
- **Add notes on documents** Users can add notes on documents, logged by user and by date.
- **Multilingual** E-File supports Arabic and English interfaces.
- **Export search results** Export metadata to a protected Excel file.
- **Multiple storage support** Store files on multiple storage devices.

MAJOR COMPONENTS

DOCUMENT & INFORMATION CAPTURE

- **Batch Scan (auto separate)** Scan files in batches using separators or specific options (ex: fixed number of pages).

- **Batch import (from folder)** Import already scanned files in batch mode from folders.

- **Batch index** The indexing of scanned batches can be done by several operators from different stations at the same time, while zooming in on relevant index zones for more convenient capture.

- **Barcode auto splitting and indexing** Automatically reads barcoded indexes on separators and assigns it to relevant documents, with possibility to fix the value of common indexes.

- **Filename indexes extraction** Extract files index values from their names based on a user-defined template.

- **OCR Auto indexing** Automate indexing schemas by performing OCR recognition on scanned images and extracting the values to relevant index fields.

- **Barcode Auto indexing** Automate indexing schemas by performing Barcode recognition on scanned images and extracting the values to relevant index fields.

- **Batch MICR indexing** Automatically extract MICR information from checks.

- **Automatic data validation v/s other databases** It complements the auto-indexing modules and ensures 100% accuracy, by checking automatically recognized index values against the business application database.

- **Auto import metadata** This module automatically imports complementary indexes from another database, thus reducing the manual indexing / correction tremendously.

- **Nature recognition** Recognize automatically the nature of documents in a batch of different natures, and perform relevant template based OCR/Barcode recognition.

- **Import from MFD** Direct import for scanned documents by Multi Functional Devices.

- **Fax integration** E-File imports faxes automatically, upon receipt (without the need to scan them), using one or more fax moderns and routes them directly to relevant departments, so they can be directly indexed.

- **XML import (files)** Import XML files (indexes and files)in batches based on a user-defined XML template mapping each entity in the XML files to an index field in E-file.

DOCUMENT ACCESS

- **Web access** Access E-File for search and view purpose through a simple web browser.

DATA CONNECTIVITY

- **Link to other database** E-File allows to link drop-down lists to other databases tables.

- **Data import from other databases** Index automatically by importing field values from other databases upon pressing a hot key.

INTEGRATION AND VIEWING

This important module allows the users to view relevant documents in E-File viewer directly from the Company's core application interface, without accessing E-File directly, so users keep using their familiar business application.

COLLABORATION

- **Task manager (Workflow)** Assign tasks and documents with deadlines and track their status till completion. It includes a dynamic notifications / reminders system for late tasks, as well as a set of useful reports.

RECORDS MANAGEMENT

Set a retention schedule for each document type and perform relevant action upon documents expiry (destroy/hide/transfer/recycle) and close or freeze records.

ADVANCED SEARCH

- **Boolean search** Search across all indexes and natures of documents using Boolean operators.

- **Saved queries** Define customized search queries for repetitive use, and share them.

ADVANCED SECURITY

- **Security by index** Grant/deny access for specific users to documents having specific index values.

- **Security by document** Grant/deny access for specific users to a specific document

INTEGRATION WITH ACTIVE DIRECTORY

E-File can import users seamlessly from the organization's domain, then simply authenticates users using their Windows credentials
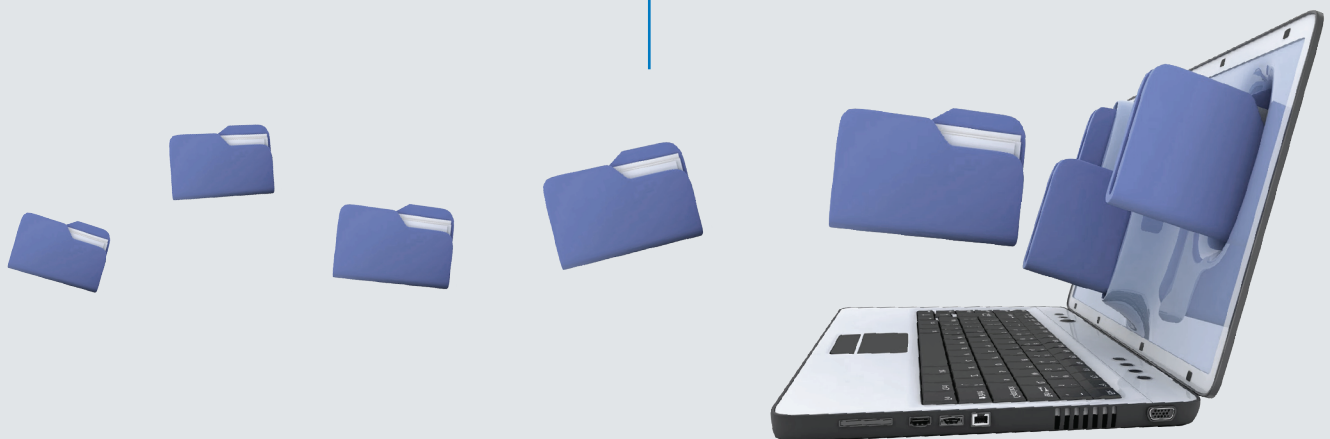
BANKING SPECIFIC MODULES

CHECKS/VOUCHERS MANAGEMENT

Full automation of metadata extraction for standard formatted documents, scanned in batches and automatically separated, using MICR/OCR recognition engines.

VALIDATION AGAINST THE BANKING DATABASE

It ensures 100% accuracy while capturing documents key indexes, by comparing them to the banking application database and to previously recognized values.

CHECKS REPORT

Generate reports containing copies of checks issued by the customer for a given period of time. The number of checks per page is parametrized

PROFESSIONAL SERVICES

ASSESSMENT

INSTALLATION

CONFIGURATION

TRAINING

GO-LIVE SUPPORT

MAINTENANCE & SUPPORT

INTEGRATION (per project)

DATA MIGRATION (per project)

CUSTOMIZATION (per project)

BACKLOG SCANNING
Project Management, Consultancy and Services (per project)