



Document Management Fact Sheet

docMgt¹ provides a bevy of Document Management features to help companies manage their digital assets. Document storage, organization, viewing, sharing and retention all play a part in document management and docMgt has them all.

OVERVIEW OF DOCUMENT MANAGEMENT

docMgt handles typical document management functions and much more. docMgt gives users the ability to store and manage all types of digital data including scanned images, photographs, electronic documents (Office, PDF) and electronic forms just to name a few. docMgt also allows users to share documents, track documents and use them for various processes such as invoice processing, reviews, approvals and more. Retention features in docMgt then allow managers to easily specify when the documents should be taken offline and how.

ADDING INFORMATION

There are a variety of ways to get data and documents into docMgt including manual entry, drag and drop, importing and scanning. Manual entry can be made simpler creating specific entry forms for users to enter different types of data. Users can drag and drop documents from their computer into docMgt or import them as needed using simple tools. Importing can also be done on a mass scale to bring in thousands of documents at one time. Scanning can be done right from within the browser to make adding new documents simple and easy.

Documents can also be added to the system without any indexing at all. Documents added this way are called Unindexed documents. These documents can then be routed to users for indexing and processing as needed.

An advanced feature of docMgt is Automatic folder synchronization. This is a way to get documents into docMgt by replicating the folders users have today. All documents are brought in and synchronized with the docMgt server. Any changes made to the original documents after import are updated in docMgt automatically so changes are never lost.

VIEWING INFORMATION

docMgt was designed from the beginning as an application that works just as well on a tablet or smart phone as it does on a computer. This allows full operation of the system from anywhere on virtually any device. The viewing platform adjusts automatically when the users views from these devices.

docMgt automatically makes Microsoft Word² and Adobe PDF³ documents viewable on all devices regardless of software installed. Furthermore, these documents, as well as image documents, are completely annotatable within the docMgt interface. Add highlights, notes, drawings, signatures and more to any viewable document in docMgt. Bates Stamping is also available when sharing documents. Exported documents can be compiled into a single PDF document for sharing and during that process Bates Stamping can be applied to the pages for informational purposes. Annotations are also applied at that time so the shared documents represent the full breadth of information available.

TRACKING

All changes to and access to information is tracked by docMgt. The users who make the changes or add new items or even delete items are all authenticated, logged and available for reporting.

Records can be also be tracked as assets with the Asset Tracking feature. Asset Tracking is the tracking of physical items by tracking the assignments, returns and requests for those assets. docMgt has a full array of asset management features designed to help track and report on assets.

MANAGING ACCESS

Records and documents can all be secured to ensure only applicable users can see and change specific information. Access can be give on a user-by-user basis or by teams of users or a mixture of both. Access can also be controlled at the data level so the data can drive the security of the system. This allows for maximum flexibility and manageability.

REPORTING

All viewing and editing activity in docMgt is tracked and fully reportable within the system. Changes to all user objects (Record, Documents), transactional objects (Asset Transactions, Workflow) as well as all administrative objects (Teams, Users) are logged individually so admins can monitor any item that changes, what changed, who made the change and when the change happened.

RETENTION

Defining and exercising proper retention policies for documents is every bit as important as storing and preserving those documents in today's litigious environment. docMgt provides a very simple but adaptable system for retention that allows documents and records to be copied off, deleted and purged at specific times in the document lifecycle.



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