

Synergy Electronic Document Management Platform with Workflows & Templates Data Sheets



**DMS POWERED BY STATE OF THE ART
BUSINESS PROCESS MANAGEMENT PLATFORM**



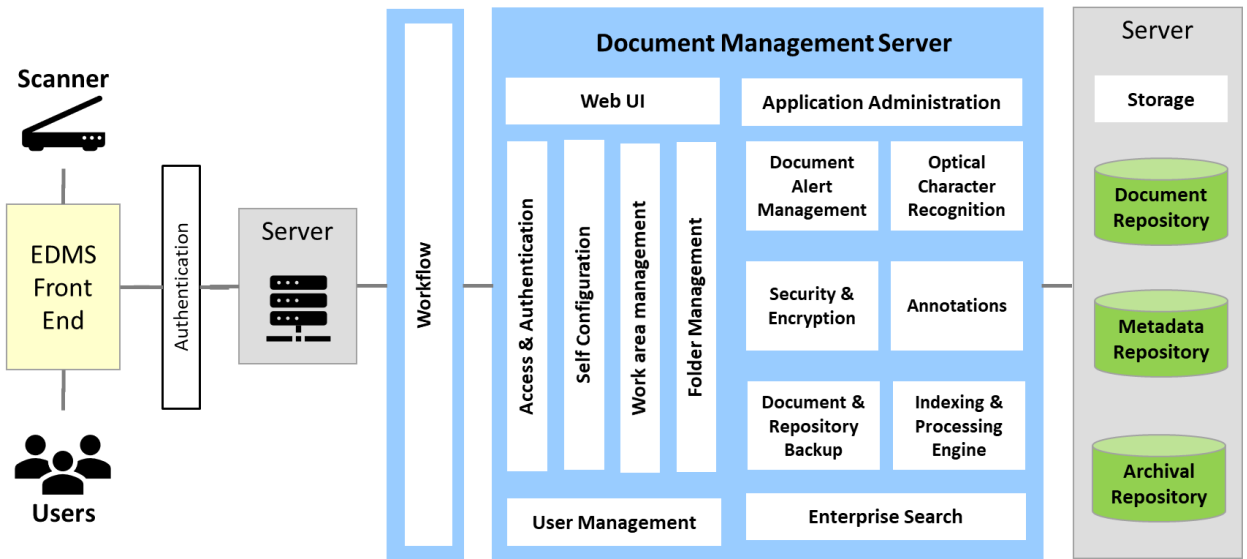
S. No.	Functional Features
1	Complete document lifecycle management – creation, retention, storage, retrieval, archival and destruction.
2	Documents can be created by uploading files or through scanner (individual or bulk)
3	Bulk upload feature – Multiple documents can be created from multiple files from local computer. With desktop app, documents are uploaded in background in asynchronous mode so users don't have to wait for document upload. Documents can be uploaded by importing XML (excel) file pointing to physical location of documents and their properties
4	Different document status can be maintained such as Draft, Pending, Approved, Rejected, Archived etc.
5	Preview documents (office and pdf formats etc) and download them
6	OCR (Optical Character Recognition) – text from all uploaded documents is extracted and indexed for quick search
7	Searching & Indexing – All documents are automatically indexed in elastic DB & fuzzy search return results with incorrect spellings also
8	Document classification and categorization – Various hierarchies of document categories can be created. Categories are useful for reporting purposes
9	Document tagging – documents can be tagged to business object references imported from other enterprise systems
10	It is possible to view documents from various dimensions using tag views. E.g. document can be viewed by department, by process, by document type, by document status or by timeline (quarterly, yearly) etc
11	Document multiple views (Tiles, List, Grid, Calendar etc.) with filter/sort
12	Document metadata is stored in Document cover (template)
13	Review comments can be entered on the document cover as well as inline comments within files
14	Document revisions and version history are maintained
15	Documents can be shared with internal and external stakeholders (vendors, customer etc.) securely with expiration date
16	Documents can be easily linked/referenced to each other
17	Document attachments – files, screenshots, images, audio notes, screen recording etc.
18	Annotation/Notes – Additional information related to a document can be stored as notes for future references either private or shared with others

S. No.	Functional Features
19	Document password – each document can be further protected by individual password for added security
20	Document archival as per policy or by user action
21	Desktop/Mobile application with self updating capabilities
22	Ability to mark documents as offline and view without live internet connection
23	Easy to use Windows style folder structure, properties and actions
24	Folder/Document permissions with inheritance – Permissions of parent folder can be inherited to subfolders. E.g. Full Access (Read, Write, Delete), Edit (Read, Write) or View only
25	Automated file placement/transfer in specific folders as per progress in workflow approval stages
26	Users can check-in/check-out documents from common folders by authorized users
27	Move or copy Folders/Documents based on permissions
28	Email and push notifications are sent to end users for related system events
29	Alerts can be configured for various events such as document expiry etc.
30	Deleted documents/folders are kept in trash as per organizational policy e.g. for 30 days after deletion
31	DMS has work management feature to centrally manage worklist of self and subordinates. Manager can reassign tasks among subordinates.
32	Users can grant access to others so that they can switch profile and take actions in DMS on their behalf
33	Private workspaces can be assigned to users with quota limits so that they can keep backup of their PC and files there
34	Document dashboard with drill down feature to oversee documents and workflow status
35	Document metadata can be exported to excel
36	Various reports to analyse documents usage, permissions, properties etc
37	Data from other systems can be brought in Synergy and analyzed through graph based artificial intelligence algorithms
38	Synergy DMS can coexist with other enterprise systems to fill all the automation gaps present in existing systems
39	Send/receive email from within DMS related to document
40	Support tickets can be created by end users within DMS and assigned to responsible teams to report any DMS related issues

S. No.	Functional Features
41	Comprehensive help library with videos to learn usage of DMS features quickly
42	Organizational policies/procedures can be automated using template-based workflows. Each Document type can be linked to separate approval workflow. User can sign digitally on workflow approvals
43	Various approval hierarchies can be created and used in workflows
44	Visual workflow designer to automate various business processes
45	Custom forms with various user defined fields, validations and rules can be created and linked to workflows easily
46	Business rules can be implemented using document and workflow templates
47	SLA (Service level agreements) lead time for each approval step can be preset in template and reports (planned versus actual)
48	Users can book the time spent on each workflow step that can be reported
49	Agile workflows – any changes in business process can be reflected in system with rolling out new version of templates
50	Workflows are shown as color coded (based on status) flowchart and card view to engage users
51	Workflow dashboard shows Pending, Approved, Overdue, Archived workflows in Kanban view
52	Reports and dashboards can be created on metadata of documents
53	Record management systems can be easily configured in DMS platform
54	Easy to migrate data from Synergy DMS to other applications, if required
55	Tile view of document shows thumbnail of stored file
56	Documents can be bar-coded, printed and stick to physical files and their location can be captured by handheld scanner to track their movement
57	Inbuilt web based text editor to capture document notes/comments
58	Documents can be locked by document owner, in order to avoid any changes or revisions. Document is automatically locked when it is under approval process
59	Document metadata with notes/comments can be printed/exported
60	Document cover can be created in draft mode & updated later

S. No.	Functional Features
1	License management – Admin can enter license key obtained from Xtranet and add more user seats as and when required
2	User Management – Admin can easily create new users as per available unoccupied seat in the license
3	Access permissions for all users can be enabled/disabled centrally
4	Admin can create workareas (for each department or project etc) and assign superusers for each work area
5	Superusers can manage creation of folder structure and permissions management for their own workarea. Superuser can request others to upload documents (assign a task). Hence each department/project superuser can manage their workarea by themselves without depending upon system administrator
6	Admin can switch users and check assigned user permissions or take action on their behalf
7	Admin can create Legal entity, User roles, Users, Teams, Workspace permission groups, Workspaces, Template Categories, Document/Workflow/Task Templates with user defined fields, Workflow stages/steps, List of values, notification templates, Distribution list
8	Document tags can be created by Admin. Tags can be brought from different systems such as ERP or Project Management module. E.g. documents can be tagged with Invoice number, project number etc.
9	Admin can configure add-ons in Synergy DMS as per license purchased such as projects, quotations, invoicing management etc.
10	No code automation - Admin can create unlimited number of document templates & capture related metadata and configure approval workflows
11	Detailed system audit reports to keep track of user activities in the system
12	Document change logs are maintained at granular level
13	All admin features are available through web browser (thin client) interface
14	Administrator can control all workflows and change their status or reassign steps to others
15	Admin can upload additional help files & FAQs related to each workflow for end users

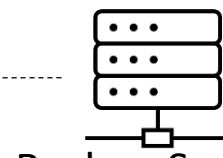
Technical Solution Building Blocks



Application Stack



Master Server(s)



Backup Server(s)



Local Server(s)

Network scanners
Printers

Desktops, Laptops

Tablets, Mobile

S. No.	Technical Features
1	Hardware - DMS server can be hosted in the cloud or on-premise Data Center. Both per user and per core licenses are available.
2	DMS can be implemented with high availability configuration and in cluster mode. DMS is highly scalable with ability to add site servers for remote (different) locations in asynchronous mode. Read only replicas can be set for faster access in each geographic location.
3	Local site servers speeds up reads and writes and minimize use of internet bandwidth. No single point of failure.
4	DMS auto data backup as per set frequency. Backups can be restored easily, if required
5	DMS can be upgraded without impacting operations by switching to failover servers, if required
6	Single sign on (SSO) integration capability with other SSO providers. User and role-based access control.
7	All documents are compressed to reduce storage space
8	All documents are encrypted in database, so even IT and DB administrators cannot view the information
9	Data is secured while in motion and at rest
10	Easy to manage infrastructure as there is no overhead of maintaining relational database separately
11	DMS can be easily integrated with existing systems (ERP, CRM etc) through web services APIs
12	3 tier Application architecture – thin client (browser based) as well as thick client (electron desktop application) & Mobile app
13	Thin client developed using Microsoft ASP.NET Core, HTML, CSS, JS along with PostgreSQL DB & Mongo DB. Other database support can be provided, if required
14	Desktop app developed using electron framework that is available on Windows, Linux and Mac
15	Mobile application is developed using Google flutter framework (compatible with Windows, Linux, Mac)
16	Fastest Graph QL APIs for mobile and desktop applications



Thank you