DocuTracks

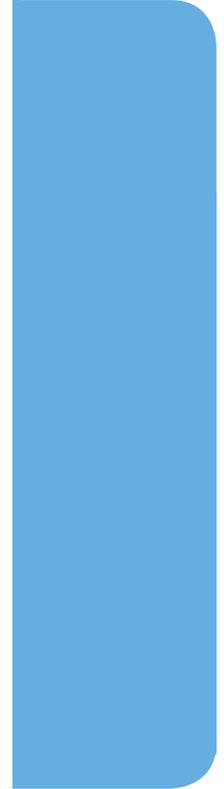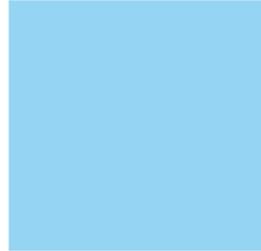## Document, Case and Digital Signatures Management System
for organizations, institutions and companies

DocuTracks is:

- **A modern, user-friendly information system for managing and distributing information and knowledge**

- Suitable and useful **for every business or organization** (public or private sector) which bases its activities on management and dissemination of large volumes of information stored in electronic or printed documents

- A complete and integrated platform for **the electronic management, digital signature and distribution of documents** and handling of **business processes and cases**, all within a unified philosophy and user workspace

- A modern information system designed using an **open architecture,** built using state of the art technologies and **compliant with various standards**, with l**ow requirements in hardware and software**

- Easily adaptable to the organizational structure and operational procedures within any organization. It has already been **implemented and operated successfully in major public institutions**. It is fully adopted by thousands of users - employees who use it 100% for all work regarding management, distribution and composite approval & signing of documents at all levels of the organizational structure

- **100% Compatible with the European legal and regulatory framework** with regards to document management and advanced qualified signature, Docutracks interoperates with all types of Secure Signing Devices (SCSDs)

Immediate benefits and results:

- fully electronic distribution of documents and transition to a paperless office
- rapid processing of issues and documents - optimal response to the external environment
- significant reduction in the administrative and management costs that may exceed 50%
- minimization or even complete relief from the significant burden of trivial everyday tasks and processes that are obsolete and generate no added value

Docutracks is an innovative technological platform that implements a modern, open architecture focused on usability.
This allows Docutracks to:

- Easily and quickly adapt to and integrate with existing infrastructures
- Require minimal time for user training and familiarization
- Can be quickly become fully operational within the organization

Immediate reduction
of printing and copying costs

Quick return on investment

Functional characteristics and capabilities

Docutracks follows an end-user oriented design and implementation philosophy with regard to the way that different pieces of functionality are offered to users of different roles and positions within the organization:

❖ End users responsible for creating and responding to documents are facilitated with
  o Effective search and retrieval mechanisms that combine multiple criteria in metadata and full text searches
  o Logical grouping and sorting of documents by type (e.g. incoming /outgoing / draft / internal documents), subject, class, etc
  o Immediate access to document distribution activities such as: dissemination to other organizational groups, return to sender, approval / signature, reply, archival, forwarding to external recipients (via fax, email or B2B or G2G services) and publication to external systems
  o Easy and direct integration and management of timestamped advanced qualified digital signatures documents and document encryption
  o Quick acquisition of documents (via upload – fax – san – print – template based document generation), registration of metadata (via intuitive adaptive dynamic forms) and long term preservation (conversion to PDF/A format)
  o Immediate access to document distribution history within the organization and information on the status of the document within each different group that the document has reached
  o Intuitive management of cases which organize related documents in logical structures aligned with the various stages involved in processing each type of case
  o Task management and registration of "case events" and structured case information within cases
  o Distribution and sharing of cases among groups
  o Archival and removal policies

❖ End-users holding administrative positions of responsibility are facilitated with
  o Assignment of documents and cases and thorough monitoring of activities carried out by the assignees
  o Tracking of user actions on a per document or per case basis
  o Request for a specific action from assignees within the context of a document or a case

  o Forwarding documents for approval / signing to supervisors or returning documents pending approval to subordinates in the organizational hierarchy
  o Automatic resolution of the correct approval / signing path within the organization, taking into consideration not just the strict organizational hierarchy but also horizontal groups, administrative authorities and complex group supervision rules
  o Implementation of a typical "assembly of the agenda for a collective body" workflow, addressed to groups such as a board of directors or a multidisciplinary committee which accepts proposals and contributions from specific users in the organizational hierarchy
  o Monitoring of operations carried out by collective bodies and committees
  o Reports, statistics and KPIs on document and case management and distribution data

❖ Users outside the organization are provided with
  o Means to input documents in the system via email or specific online hubs (such as "submit your complaint or suggestion" or "submit an online form with your application" web forms – such electronic submissions are automatically transformed into documents and routed to the appropriate organizational points)
  o Ability to monitor the status of an issue raised by an external user through the online submission facilities mentioned above, by publicizing the status of the corresponding document created and circulated within **Docutracks**

❖ System administrators are provided with means to:
  o Manage users, permissions, roles and authorizations
  o Manage and configure the organization structure and the distribution of responsibilities and rights of supervision on the organizational structure
  o Manage document and case metadata
  o Design and export specialized reports, analytics data and performance indicators through an advanced embedded reporting mechanism

Potential Market

i. **All public organizations,** institutions, companies and authorities of the central government

ii. **All local government authorities** at local or regional level, with a corresponding customized version

iii. **Hospitals and institutions** in the Healthcare and Pharmaceutical Industries

iv. **Service companies & consultants,** technical offices and law firms

v. **Banking and insurance** sector organizations

vi. **Any company or organization** that bases its operations on the management and distribution of conventional or electronic documents.

The features and functions of the system are provided within a friendly and familiar environment, very similar to online email applications. The basic user interface is organized in five distinct areas, as demonstrated in the figure below:

- Αριστερά (A) : This area hosts grouping, searching and filtering options for the documents catalogued in (B)

- Middle Top (B): The list of documents accessible by the current user, based on their role position in the organization and grouping / filtering options set from the choices on the left

- Middle Bottom (C): Detailed or concise presentation of the selected document and its metadata, including detailed information on the status of various "virtual document copies" that have been circulated to various units within the organization
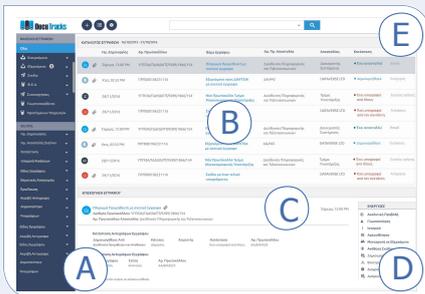
- Bottom Right (D): the context menu that provides a dynamic interface to actions that the current user can execute on a selected document

- Top (E) : The main menu with options for registering a new document, selecting a catalogue view, managing the current user's profile or gaining access to various administrative functions that are available to the current user

Technical specifications

The driving forces behind the technical design of Docutracks are:

a)The state of the art in Internet and Web technologies and the emphasis placed today on modern and usable user interface (UI) and user experience (UX) design patterns

b) The use of "the document" as the basic means for encapsulating and distributing information within organizations, information that models and follows business processes established in each organization

The particular technical characteristics of the architecture and individual subsystems of Docutracks include:

- o Open, modular and scalable architecture

- o Support of all modern browsers

- o Implemented using cutting edge technologies both on the server (ASP. NET MVC 4) and at the browser (jQuery Ajax)

- o Ability to add new functionality by building and integrating extra modules

- o Rich APIs for integration by third party systems

- o Use of specialized web browser add ons for easy and direct integration of advanced qualified digital signatures in documents

- o Native applications for mobile devices (smartphones and tablets)

Docutracks is designed and built as a compact, concise web application, which can be directly integrated with existing infrastructure within an organization, requiring minimal additional investment in hardware or software.
A specialized software utility can route any document from any third party software, directly to any user's incomings box for digital signing in Docutracks
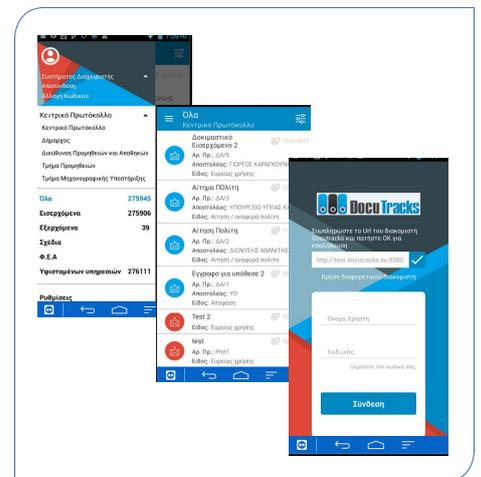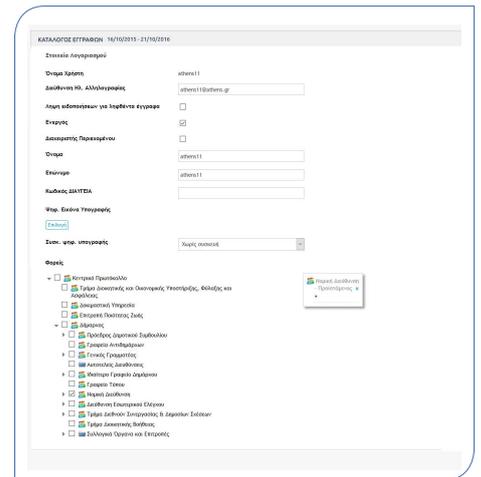
The 10 main advantages of Docutracks

…compared to other products that cover all or part of its functionality

01. **Modern and friendly user interface.** Docutracks is accessible through any web-browser any device and its email-like functional and interactive features enable immediate use by the majority of users without requiring significant training. Thus, the application can be easily spread within organizations with tens or hundreds of users in a very short time and can be fully productive immediately.

02. **Integrated approach:** Docutracks follows the principle of "many systems in one": e-Protocol, management and distribution of documents, case management, digital signatures. This way, it automates trivial tasks that can be executed with or without human intervention. Common procedures using conventional and/or electronic means, the completion of which typically requires significant effort and offers little or no added value, can now be substituted with practical and automated procedures, within which application of digital signatures is optimally integrated

03. **Location and time independence:** Users can have direct and efficient access to the system wherever they are without worrying about where the documents are stored and where the application is installed. This makes Docutracks ideal for organizations that have facilities in several buildings in different geographic areas, and for those whose nature of work requires them to be away from their desk for a long period of time.

04. **Easy search and localization of every document of immediate concern:** Docutracks features multiple and adaptive ways for indexing and retrieving information tailored to the specific needs of each organization.

05. **Direct and easy registration of documents and their metadata:** Docutracks provides dynamically customized forms that facilitate the user by limiting the number of fields that need to be filled in or selected. Users are automatically and quickly redirected to the next process without being "lost» into a plurality of fields and information that ultimately is not related to their specific work.

06. **Low infrastructure requirements and easy and direct integration into existing hardware and software infrastructure.** The above, combined with the virtually unlimited interoperability possibilities with existing IT systems (ERP, CRM, CMS, internet and intranet sites, Directory - e-mail Servers, etc.) gives an advantage to Docutracks compared to other competing systems, which may have been years on the market, but lag in interoperability support, architecture, user friendliness and performance.

7. **Limited administrative overhead** for the continuous operation of the system within the organization, comparable to that of a medium-sized web site or application.

8. **Low acquisition cost per user** coupled with the fact that Docutracks delivers immediate improvement of performance throughout the organization and leads to direct and indirect cost savings when compared to the conventional procedures that it substitutes

09. **Multiple and user friendly ways for a system administrator to customize data and operations** within Docutracks such as the organizational structure, responsibilities and roles of the staff, structure and metadata of documents that are used in the decision-making processes by individual and collective bodies. Docutracks also offers flexibility and easy adaptation to any future changes in the organization's structure and processes, especially to those related to the integration of the digital signature

10. **Easy access to critical information and opportunities in every level of management** - roles of responsibility, escalating in scope from lower to higher levels, for resolving issues and matters, work allocation, routing and acceleration of decision making and approval and measurement of the effort that is required to run individual processes based on the management and distribution of documents.

Guaranteed Total Transition to
Paperless and Inkless Office