



eFileCabinet

Building a Better Organization through
Advanced Document Automation
Management Software (ADAMS)



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1. An Introduction to Document Management Software (DMS)

THE RETURN ON INVESTMENT (ROI) OF DMS

eFileCabinet helps small to mid-sized organizations and departments within larger organizations increase profits via streamlined, paperless processes. Our top-rated document management technology delivers ROI by increasing operational efficiency, simplifying compliance, and ensuring data security. We know it can be difficult to pay a lot of money up-front for enterprise software, and that's why we offer our products on a subscription basis for as little as \$50 per month—letting you renew based on experience with our product rather than buying it on hope.

Most paper-dependent organizations are so used to handling paper that they do not notice the administrative costs paper-dependent processes bring via document misfiling, faxing, snail mailing, manually searching for information, and manual contract signing until they invest in DMS.

Document management provides organizations with convenience, peace of mind, more free time, professional growth, and, ultimately, freedom: the freedom to increase profits, acquire greater market share, become an industry leader, harness the time to tackle projects for which many organizations are yet to find the requisite resources, to better serve customers and clients. Here's what some of our current customers have accomplished with eFileCabinet DMS:

OVERALL SAVINGS WITH EFILECABINET

Lori Wurzel of NC Financial Group/Straxclinic Inc. **saves \$19,875**

Carlene Patterson of Ascension Financial Group **saves \$4,600 per year**

David E. Soto of SOTO Property Solutions **cuts annual office supply costs by 35%**

SAVED STORAGE SPACE WITH EFILECABINET

Larry Boyd of Oak Bridge Financial **saves \$10,000 annually** in freed up storage space

Patrick Ballard of Ballard & Company **eliminated 17 filing cabinets** from his office

Deanna Hancock **dislodged 60% of her storage space** held by paper

LABOR REDUCTION WITH EFILECABINET

Jonathan Felt of UST Manufacturing LLC **saves 80 hours of paid labor per week**

Deanna Hancock subtracted as many as **20 steps from her workflow** process

Ryan Utecht of New York Ins. spends **less than 20 minutes per week** on finding and filing docs

[See What Customers Are Saying](#)

2. DMS Platforms

CLOUD-BASED DMS AND MOBILE

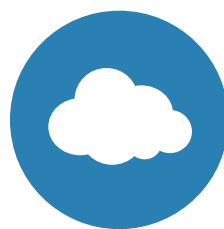
Requiring no tech expertise and functioning like a normal web page on the internet, our cloud-based DMS is our most popular DMS platform.

An ideal option for smaller organizations and startups looking to reduce operating expenses, this DMS platform primarily facilitates growth, mobility, and information accessibility.

Our cloud-based DMS enables organizations to access data with our mobile apps, which operate on both iOS and Android mobile devices.



[See the mobile app in action here](#)



[Learn more about our cloud-based DMS](#)

ON-PREMISE DMS

On-premise(s) DMS is viable for organizations with preexisting IT teams, limited mobility needs, and few travel demands. Hosted on a company's internal server, this option provides organizations' IT teams with more control over the software. On-premise(s) solutions are also viable options for organizations in rural locations, as these areas tend to provide less internet bandwidth and access options.

Although this control is beneficial, cloud-based DMS is a better option for organizations that A) have remote employees, B) are trying to scale back on power bills, and want the freedom to access info from anywhere without compromising security.



[Learn more about our on-premise\(s\) DMS here.](#)

3. DMS Features and their Benefits

HOW TO BE MORE EFFICIENT

A. SOFTWARE INTEGRATIONS



eFileCabinet provides drag and drop functionality with Microsoft Office, enabling users to store files created inside Microsoft Word, Excel, Outlook and PowerPoint directly into eFileCabinet with one click.



Far more efficient than traditional signatures, digital signatures not only reduce document turnaround times, but also have been shown to increase sales. [Learn more about digital signatures here.](#)



We integrate fully with the world's most popular and easy-to-use CRM software—salesforce, enabling you to view files and drawers stored in eFileCabinet Online without leaving salesforce. [See this integration in action.](#)



Our partnership with ShareFile, an Enterprise File Sync and Share (EFSS) solution by Citrix, provides customization with built-in, enterprise-grade solutions for a range of industries also in need of document management software.

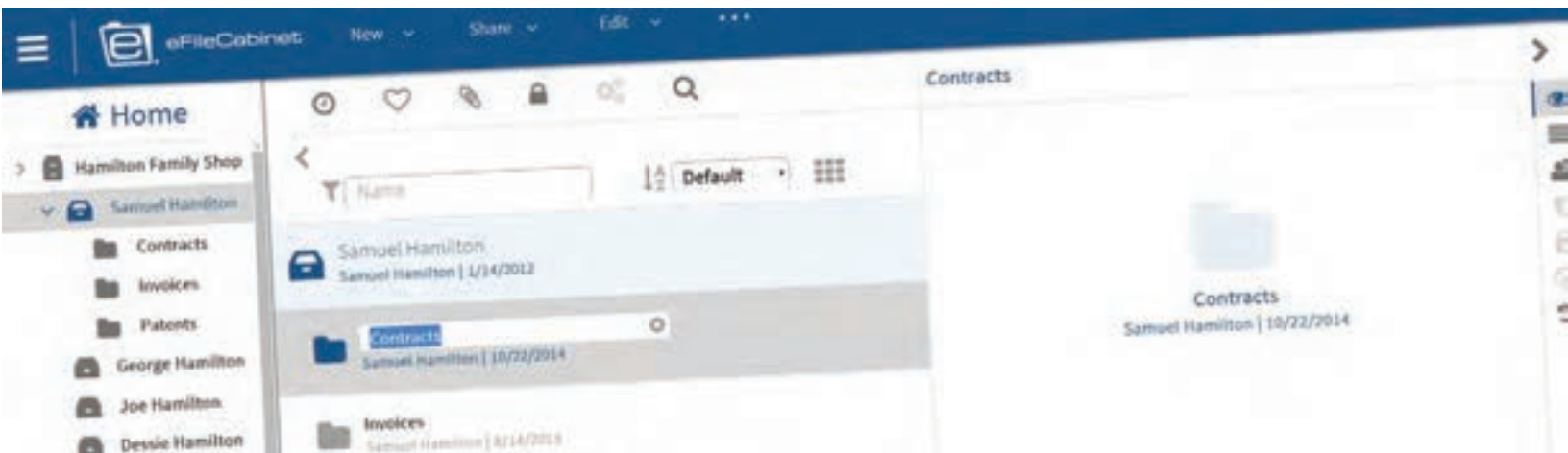


This integration lets you create and edit interactive PDF documents you want to store and share within eFileCabinet.



B. ZONAL OCR (OPTICAL CHARACTER RECOGNITION)

Zonal OCR is the equivalent of a virtual office assistant, and is perfect for managing often used or scanned forms: Once a document is scanned, Zonal OCR automatically routes it where it needs to go within eFileCabinet. It also helps scan and view specific portions of documents for faster document search and retrieval. Zonal OCR does this by adding metadata from scanned documents such as names, dates, invoice numbers, and other data inside the document—helping DMS users store and classify documents accordingly. [See how it works here.](#)



C. TEMPLATES

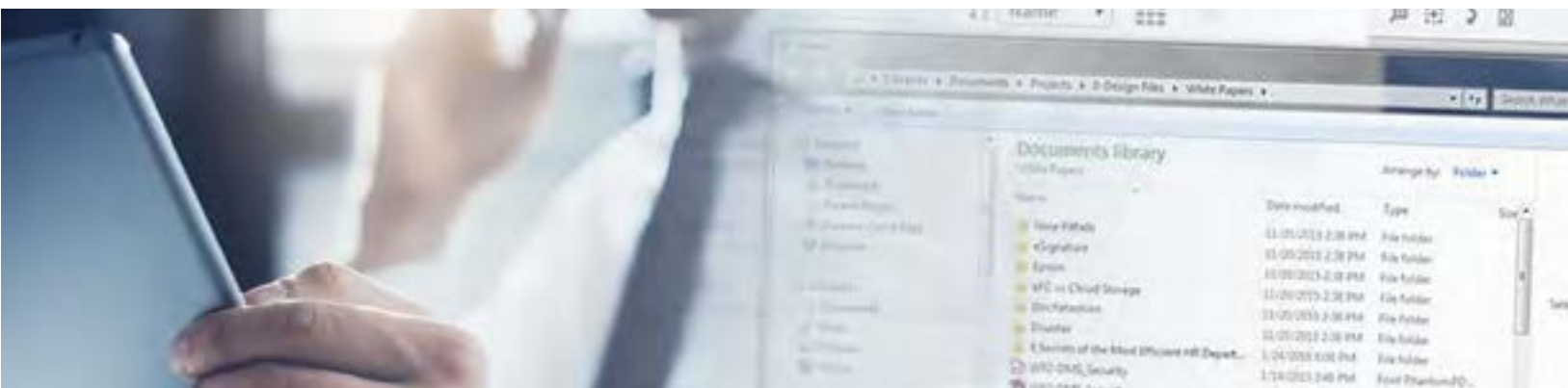
A template re-creates a pre-applied folder, drawer, or cabinet structure within a document management platform. Essentially, templates take the concept of a shared drive, as one would see it on a Windows Desktop, and regenerate it to yield the benefit of automated but user-specified information structuring. [See how it works here.](#)



D. WORKFLOW AUTOMATION

Workflow automation simplifies the most complex project management processes. Through workflow automation, managers can specify who collaborates on what documents and projects, automating a desirable process to project and document completion. Workflow visualizes, diagrams, and specifies the order of tasks in a project, making employee accountability, deadlines, and optimal workflow processes easier to gauge, manage, and actualize.

eFileCabinet DMS provides email notification features signaling completed steps within the workflow feature. Profile-routing within the workflow allows workflow administrators to predetermine the workflow for each document based on a matching set of values. [See the eFileCabinet workflow feature in action.](#)



E. FILE VERSIONING

Versioning is a process by which documents are checked in or out of the document management system, and the changes made during the interim between checking out and checking in files are recorded by the DMS without requiring document editors to change the file's name, and, consequently, reducing clutter in the user interface. [See file versioning in action here.](#)

HOW TO INCREASE SECURITY

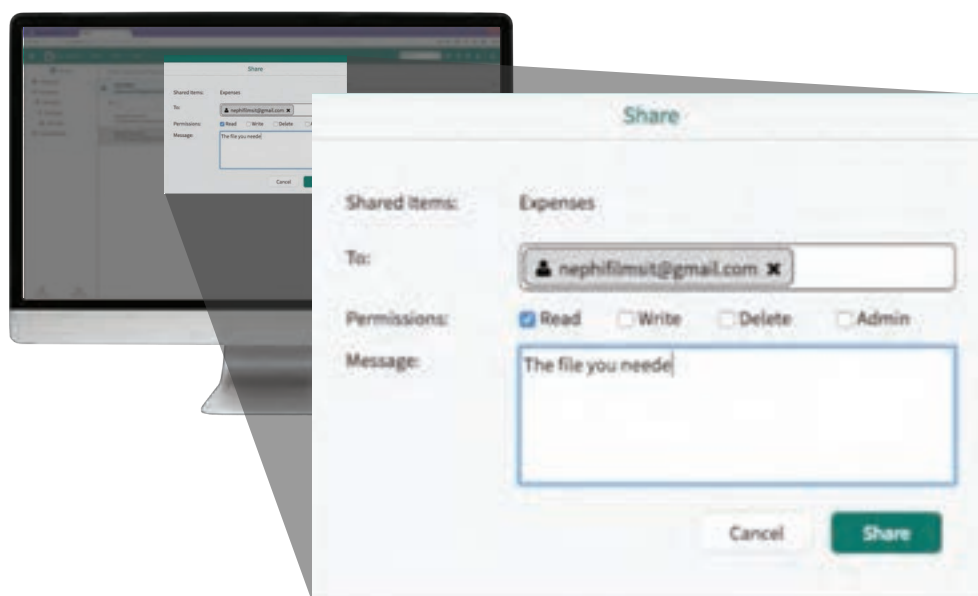


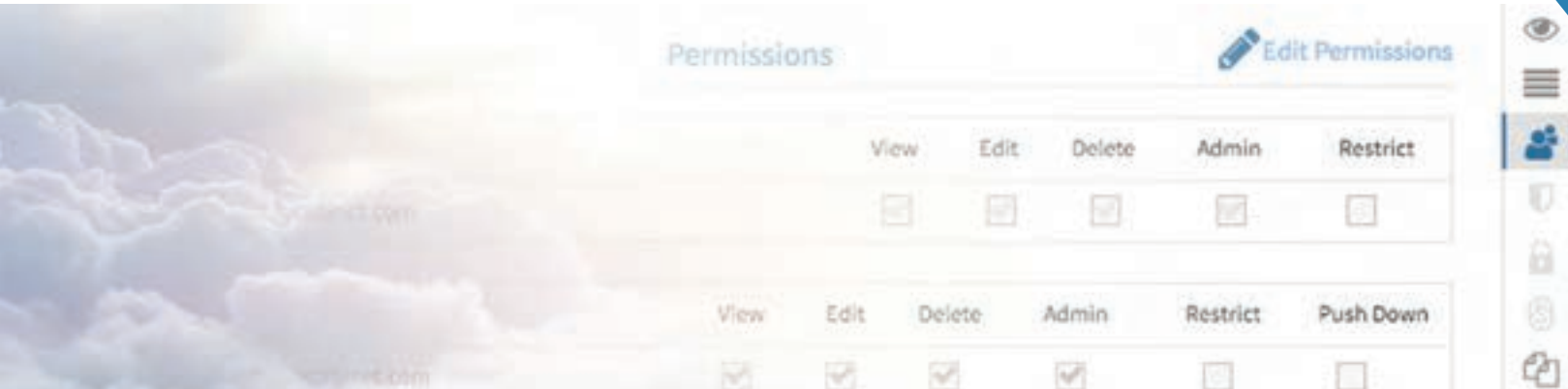
A. SECUREDRAWER CLIENT SHARING PORTAL

Our client sharing portal, SecureDrawer, is a highly encrypted alternative to email—email no longer being a breach-proof means of sharing sensitive client and customer information.

The file-sharing features of SecureDrawer include bank-grade, 256-bit Advanced Encryption Standard (AES) and SSL (Secure Sockets Layer) security on data sent from the organization's worksite to the solution's data centers and/or clients.

SecureDrawer also allows organizations to customize the branding and design of the client sharing portal's platform, ensuring branding consistency in the same way an email signature in Microsoft Outlook would, but through much safer technology. [See SecureDrawer in action here.](#)





B. ROLE-BASED USER PERMISSIONS

Role-based user permissions differentiate standard users from users with permission to access certain files within a DMS.

With role-based user permissions, administrators can also manage file retention schedules and employees with equal precision—automating, in many respects, the managerial process. Role-based user permissions provide ‘view only’ access to organizations in any industry that is subjected to audits, to ensure auditors or other users won’t mistakenly or deliberately alter the information. [Learn more about role-based user permissions here.](#)



C. AUTOMATED BACKUP

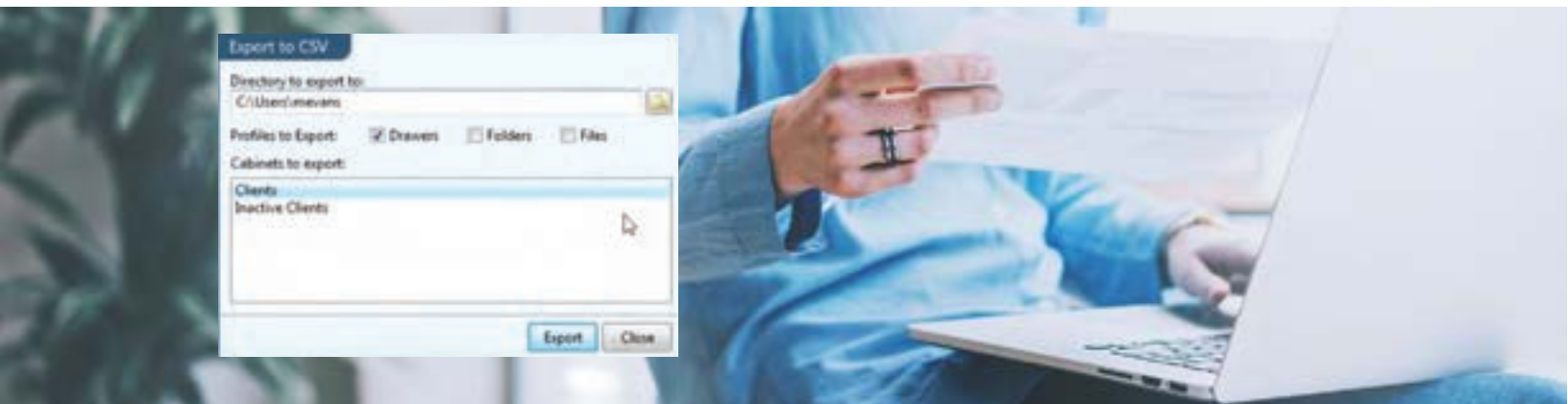
Automated backup ensures retention of an organization’s database structure and files on a regular basis; it is a high-level data destruction-resistant feature safeguarding organizations from the data loss that would otherwise occur in the event of a natural disaster. eFileCabinet DMS backs up data and information every 24 hours, and also comes with a complete eFileCabinet restore function.

HOW TO INCREASE FUNCTIONALITY



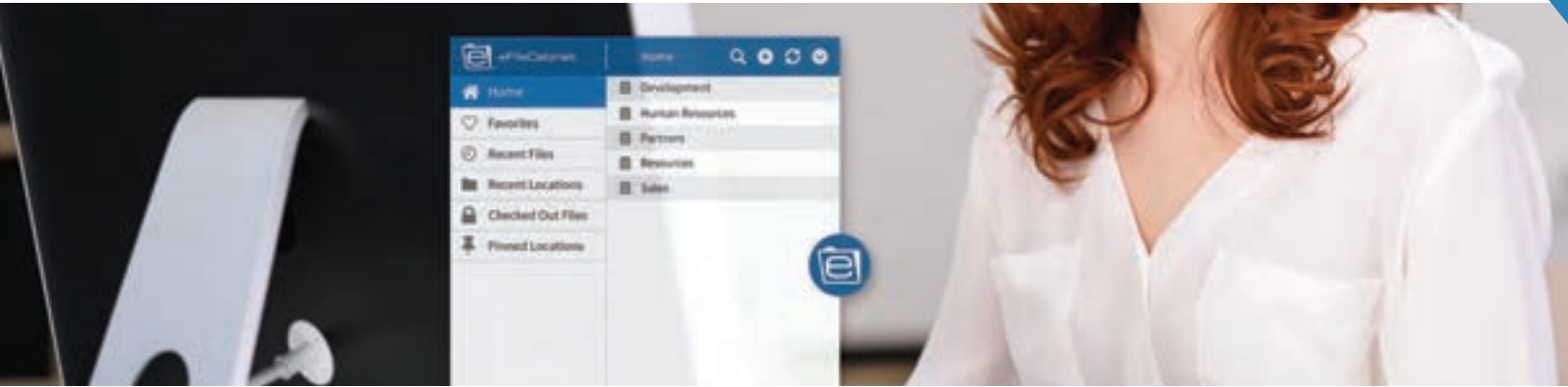
A. OPERATING SYSTEM COMPATIBILITY

Our online document management products work with Windows, Mac OSX, iOS, and Android operating systems. eFileCabinet On-Premise(s) is compatible with Windows operating systems only.



B. CSV FILE IMPORTING AND EXPORTING

CSV file importing and exporting put the data entry profession on the brink of extinction. A key component of data structure, CSV is also essential to expediting the DMS data import process. [See CSV exporting in action.](#)



C. SIDEKICK

This instant access tool serves as the bridge between your work devices and eFileCabinet DMS, eliminating the need to toggle back and forth between programs. It also provides rapid file uploading—up to 50+ files at a time—automating a process that would otherwise take much longer.

SideKick also provides the pinning and unpinning of locations in your eFileCabinet file structure, which helps to locate information more quickly inside the software. [See the SideKick in action here.](#)



D. AUTOMATED FILE RETENTION AND DELETION

Not only does this feature ensure compliance for organizations needing to keep documents only for certain periods of time, it reduces file clutter and storage—automating the file deletion process when these files' information is no longer needed.

Additionally, digital archiving prevents document damage that otherwise occurs over long periods of time if documents are stored manually in filing cabinets. [See automated file retention and deletion here.](#)



F. SATELLITE/REMOTE ACCESS

For use with eFileCabinet Online, this feature prevents the need to audit and review documents in person at various branches of an organization, ensures compliance among various office locations, and helps administrators regain control of the unstructured information.

Essentially, this feature allows admins in corporate headquarters or entities to access any of their satellite or remote offices/access points, and from any location—also serving as a useful auditing tool.



G. AUDIT TRAILS

The internal audit trail function of DMS allows administrators and managers to track the activity of an employee. In the event of an external audit, which entails a third party neither employed nor paid by the business under audit, this feature makes information accessible, traceable, and compliant within the DMS. [See an audit trail in action here.](#)



H. A NOTE ON AUDITING

The most crucial benefit of the DMS external audit trail function is the reduced amount of time it takes to complete the audit. This is especially true given the ever-increasing rate of organizations' information retention and regulating bodies' expectation of auditors to conduct more information audits.



*Do you have additional questions about
document management software?*

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