Innovation meets ECM

An ECM-Suite made by iworxs GmbH & Co. KG

We have the solutions to get your daily work done faster and more productively. Optimize your throughput times by simultaneously improving your job satisfaction.

This brochure provides you with a quick overview of solutions that you can use to improve your business processes and to fulfill legal compliance.

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Improve your business
iworxs ECM-Suite™

Our solutions to increase your productivity

WE HAVE THE SOLUTIONS WHICH HELP YOU TO GET YOUR DAILY WORK DONE FASTER BY HELPING YOU TO MASTER YOUR DOCUMENTS.

Each module helps you to keep control of your business data over the complete information life-cycle.

No matter what the original data format was like, our solutions help you to have the appropriate information at your fingers.

Scanning	Indexing and Classification	Forms Processing
Document Centric Inbox	Enterprise Report Management (COLD)	Searching
Managing Documents	Revision Control	Office Integration
Virtual Folder	Reminder and Task Management	Compliant Electronic Archiving & HSM
Messaging Center	E-Mail Management	E-Mail Agent for Microsoft Outlook
E-Mail Agent for Lotus Notes	Mail To Archive (SMTPD)	Print To Archive (LPD)
Workflow - BPM	ERP Integration	Automation Services
Auditing & Reporting	Mobile Media	Custom File Structure

Technical Specification

Languages: The ECM-Suite supports a wide variety of language including German, English, French, and Italian etc. Language can be changed dynamically on the fly.

Operating Systems: Server runs on Microsoft Windows including High Availability Cluster and it also runs on most Linux-based Operating Systems. The server is available as native executable or as a docker image. The Java Rich Client supports Windows, Linux and Mac. The Web Client runs smoothly on Google Chrome, Firefox and Edge.

Databases: The ECM-Suite supports Oracle RDBMS, Microsoft SQL Server, MySQL and PostgreSQL.

Technologies Used: Java, SOAP, XML, JNI, OpenOffice, jBPM, PDFBox, POI, Lucene Text Search Engine, Microsoft .NET, C/C++, JavaScript, Vaadin, Angular, Docker, Kubernetes and many other open source frameworks.

Directory Service Integration: Microsoft Active Directory, Lotus Domino Directory and OpenLDAP.

Certification: Network Appliance's SnapLock, FalconStore FileLock, EMC File-Level-Retention on Celerra, Graudata Filelock

Others: RSA SecureID, OpenID/Keycloack
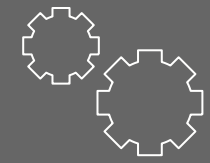
Integrates seamless in your IT-Infrastructure

Highly Customizable

Intuitive and Easy To Use

SCANNING / DIGITALIZATION

A first step to speed up your tasks is to digitize your paper-based documents. Do it with the integrated scanning ability - quickly and easily or use any other scanning solution. Our scan solution helps you to split, move, rotate and compose new digital documents based on your needs. To work efficiently the iworxs ECM-Suite helps you to distribute the documents either automatically to the responsible people or manually.

INDEXING AND CLASSIFICATION

To reduce the time for key-wording documents our solution offers you a very sophisticated indexing mechanism. For example, it offers a smooth access to your master data from your database system. Furthermore, if the related folder or document already exists and you like to append the new document then you only need to select the existing folder or document and drop the document into it. This highly generic and customizable approach eliminates the need for cumbersome manual key-wording and reduces the probability of errors at maximum.

FORMS PROCESSING

If you have a lot of well-known and well-formatted paper-based documents, like invoices or delivery notes, then you might use an automated approach. In this case you can use a third party forms processing solution or the software solution of our business partner ABBYY. In both cases integration can be done easy. The extracted relevant data are provided by a XML or CSV index file. Our automatic import task may observe the exchange directory and can detect any new incoming data and import the documents based on the recognized data. If required, the process can distribute the documents to the responsible people by rules based on the recognized data (meta data).

DOCUMENT CENTRIC INBOX

Each user has a private inbox where he can store documents for any need and of any type and format. The inbox is his primary workspace. The inbox acts like a document centric task list. Assigned documents or not indexed and classified documents are stored here.

Controlled by a set of roles the user can upload files via an upload dialog or via drag&drop, but also, he can assign or forward any document to a specific user or a workgroup. Furthermore, he can receive new documents from different sources, like the archive printer, a fax device, multi-function device, e-mail server or by any other rule-based dispatcher task. A very sophisticated indexing wizard helps him to key-wording, respectively filing the documents with low effort in the proper digital repository.

ENTERPRISE REPORT MANAGEMENT

Enterprises have spent many years implementing and perfecting their core transactional systems of record. For most companies, these systems perform well and get the job done. However, capturing information from these core systems of record is still a challenge for virtually every enterprise. The iworxs ECM-Suite ERM/COLD solution can automatically capture report output from structured data. It could quickly index, catalogize and store the content in the archive.

The solution captures print streams in ASCII and EBCDIC for simple line reports, as well as from structured PDF documents, but also from form-based PDF documents too.

SEARCHING

Finding documents rapidly to speed up business processes is one crucial issue nowadays. Retrieving documents, flaw-less and clearly structured will led to highly motivated employees who no longer waste time in searching for documents.

The Search Engine can be used for virtually any purpose, such as customer records, contract records, project records, patient records, etc. The Search Engine supports searching by keywords (indexes), searching according to a filing-plan or searching via full text or by combining these capabilities. As the searches are based on a generic approach, they can be customized to fulfill different requirements and security needs. Different queries can be assigned to authorized workgroups or people to meet sharing documents.
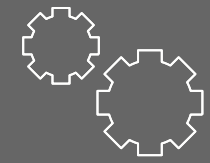
Scanning, Indexing and Classification

Indexing and Recognition

Searching and Managing Document

MANAGING DOCUMENTS

Paper archives with overflowing file folders or office documents located in different directories with self-made structures, which only few employees understand, will become a thing of the past when you start using the document management features of the iworxs ECM-Suite.

With the highly customizable file plan management inside the iworxs ECM-Suite your company is able to create shared and clearly structured repositories. The file plan is a powerful solution to establish workgroup-wide or enterprise-wide structure for filing documents and to ensure the continuity of information and knowledge sharing.

Additionally, functions like move or copy documents between repositories enables you to adapt or enhance the structure to new business requirements while maintaining the overview and control of your documents.

REVISION CONTROL

Every day, your organization creates a huge volume of unstructured content that includes purchase orders, employee records, financial reports, contracts, quality documents, engineering drawings, e-mails, presentations etc. The challenge is to help the user to do this in a team and to maintain a traceable history using the iworxs ECM-Suite's revision-control. As these documents are not simple text files, an exclusive locking approach is being used. The user is able to check-out, check-in, undo any check-out, and to tag and to show the document change's history. With the "Mark as Final" function the user can put documents into the long-term archive repository. If the Office-Integration option is activated, then Word, Excel and PowerPoint are embedded seamless inside the client. The user does not need to change application in this case.

The revision-control works also fine for other types of documents, as far and appropriate text processor is available on the PC. When the user checks out a document, then only one copy is copied to the user's home directory, hence the user is able to open this document for editing outside the ECM-client. This is a good option when working offline, too.

OFFICE INTEGRATION

A huge amount of users use Microsoft Office every day to create and edit documents. We have added a couple of features to help the user to be more productive when working with Office documents.

First, we have added support to view Office documents inside the client. All common Office documents are shown embedded inside the ECM-client; hence the user does not need to handle additional windows and application on his desktop. Next, when using the ECM revision-control, editing can be done embedded, too. When the user saves the document he will be automatically asked whether to check-in the current changes as a milestone. This seamless integration reduces the handling a lot and the user can concentrate to the real business task.

Furthermore, the ECM-Suite offers a document template pool. This pool is a well-structured collection of documents which are used e.g. as office templates. With this feature, the life-cycle is nearly completed. Instead of searching for adequate templates on organizations file servers, the user is able to search via keywords for the template or by navigating through the filing plan and to find the right template quickly and without problems.

When creating an Office document based on a template the ECM-Suite will guide the user by an Import&Indexing Wizard; hence at every step the user will be guided.
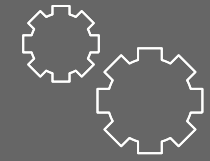
VIRTUAL FOLDER

The file plan and the powerful search abilities are a great way to find and manage documents, but often this isn't what you want to use to navigate and find the content you are looking for. Typical use cases are recurrent business processes or long-term business processes which will run for weeks or months. As you need almost the same documents, the best approach is to create a virtual folder (collection of documents) and collect and add the required documents to that virtual folder. You are able to store as many virtual folders as you need. The virtual folders are shown at your fingers in a sidekick bar so that you can access them very fast without going long ways. Furthermore you can share virtual folders with other users, too. This boosts collaboration among different users.

REMINDER AND TASK MANAGEMENT

Working day by day with document centric business tasks requires the ability to sort tasks and notify you on due tasks. This can be done easily with the reminder ability of the iworxs ECM-Suite. Just select the document you need to be reminded of and set the due date. As the reminder supports virtual folders, you can add as many documents as you like in the reminder. If you are allowed to assign reminders to other people then you can do this, too.

The iworxs ECM-Suite offers a highly customizable reminder and task management. Reminders can be generated automatically based on specific events and custom data (metadata). For example it is possible to generate reminders automatically while new documents are imported. The same can be done for tasks (work items). This extremely powerful feature allows you to create tasks and to assign them to responsible persons or workgroups. It also supports deputy and escalation persons or workgroups. A more powerful and enhanced solution is provided by the Business Process and Task Management which gives you the ability to define more complex workflows.

COMPLIANT ELECTRONIC ARCHIVING

With the iworxs ECM-Suite you get a very fast, reliable and professional archiving solution to store digital documents of any formats. As all documents are stored centralized, users can access the required information fast and secure via the ECM-clients, in relation to the business context and with a clear and safe security policy.

The retention time can be calculated and assigned in different ways: By using one of the standard document types, through the file-plan or by using rules based on custom metadata. By enabling the WORM option, the retention time is pass to the physical layer via certified WORM solutions like NetApp's SnapLock or EMC Filelock.

This solution fulfills compliance directives such as Germany's the GDPdU, GoBD, GoB, SOX and others.

Knowing that all documents are accessible even after decades gives our organization a tremendous feeling of confidence and trust.

HIERARCHICAL STORAGE MANAGEMENT (HSM)

The iworxs ECM-Suite provides a policy-based management of archiving files. This is done in the way that storage devices are used economically dependent on costs and reliability and without the user must be aware of when files are being retrieved from a primary or a secondary storage. In contrast to most add-on low-level HSM solutions where the policy is based on file type, size, or age, the iworxs ECM-Suite policy uses business-related rules and criteria. This satisfies the company's need much better, as files are stored in relation to their context.

Once the rules are set up, the module manages everything automatically. To make the processes transparent a couple of monitoring views are available, so that the administrator has a continuous control over the status of the file movements.

E-MAIL MANAGEMENT

The iworxs ECM-Suite is a highly flexible and customizable solution which enables complete, long-term and secure archiving of incoming and outgoing emails. This helps to reduce costs and mitigate the risks of compliance and litigation.

The solution addresses a wide range of your organization's email problems, including:

- The escalating cost of your Microsoft or Louts email system. Aren't you purchasing additional servers to counter to performance degeneration and dwindling storage space? Aren't you struggling to execute backups? Are you moving into the cloud and are missing some crucial compliance features or costs are increasing continuously?

- The inability to access, identify, manage and destroy the business relevant content stored in email records in accordance with regulations and internal policies.

- The risk of being unable to reproduce email records for different needs.

- The frustration of users who delete important emails in order to free space to meet mailbox storage quotas.

One core approach of the iworxs ECM-Suite is to fetch all emails from the email server's journal database. In another task all or specific users' mailboxes can be scanned and imported automatically by applying custom filters. Finally, if activated, a migration task shrinks the emails in different modes (stubbing). While shrinking an email a hyperlink to the archived mail is stored in the email's body as a reference to the archived copy. The user only needs one click to view the full email.

While storing emails a duplicate email detection process is applied, which saves a big amount of storage. The E-Mail Management solution also gives you the ability to import PST files, so that it is no longer necessary to store error-prone and difficult to control PST file externally anymore.

E-MAIL AGENT FOR MICROSOFT OUTLOOK (ADD-IN)

Having access to information at your fingers is a must nowadays, especially when emails have been migrated to external email archives like the ECM-Suite. To give the user a smooth and fast access to migrated emails, the iworxs ECM-Suite offers an E-Mail Retrieval and Restore Add-in which integrates seamless into your Microsoft Outlook. It helps you to find the email you need and if required to restore the email back to your email server. Furthermore you can select one or multiple mails and import them to your iworxs ECM-Suite inbox. From there you can key-word the email and add it to the related process.
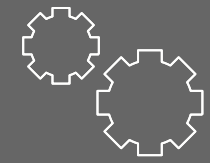
E-MAIL AGENT FOR LOTUS NOTES

Identically to the E-Mail Agent for Microsoft Outlook the E-Mail Agent for Lotus Notes gives the user the ability to search, restore and import emails.

MESSAGING CENTER

Exchanging messages related to document centric business processes among the organization without using a traditional email server helps to increase productivity by decreasing costs. The main benefit is that the attached documents inside the messages are not attached. By default hyperlinks are used.

The Messaging Center notifies the user also about specific, registered events. All messages are stored in a similar way like traditional email systems; hence messages can also be easily exchanged. Having stored all messages in a separate message inbox, the user is able to search very fast for messages without having to use any additional application.

MAIL TO ARCHIVE (SMTPD)

Mail to Archive is a simple but efficient way to integrate your fax or multi-function devices in your ECM infrastructure. There is an SMTP daemon available in the iworxs ECM-Suite which listens to the standard SMTP port and is ready to receive email-based messages. The way to distribute the messages to the people is controlled by rules which can be highly customized.

Customers are also using this ability for automated email- based B2B processes. A forwarding rule on the email server can route structured data added as attachments to the iworxs ECM-Suite. Afterwards, these data can be captured, distributed, automatically indexed, and finally stored into the digital archive.
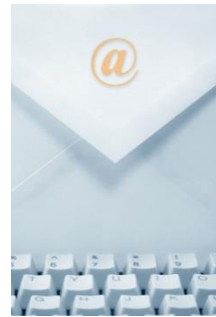
PRINT TO ARCHIVE (LPD)

One undervalued option how to transfer data of any type to a digital archive is PRINTING. Every application on nearly every operating system supports the Line Print Protocol.

The iworxs ECM-Suite comes with an integrated Line Print Daemon which gives you the ability to print any kind of document by using a postscript printer driver. The daemon listens for new data, converts the data to PDF and, if defined, starts a serial of post-processes like distributing the data to the user's inbox, capturing content etc.

WOKRFLOW – BPM

The iworxs ECM-Suite business process management solution enables you to create, deploy, modify and manage business processes. The solution integrates content from multiple data sources with people. The Smart-Workflow module integrated in the ECM-Suite guides employees through decision-making processes, helps to automate the routing and processing of tasks (with the goal to reduce the amount of human intervention needed), improves the collaboration and allows managers to view real-time process performance.

Custom workflow forms can be created easily with the iworxs Active & Dynamic Forms Generator (ADF) and thus capture process-related data. The automatic escalation monitoring ensures that time-critical processes will be done in time.

For large-scaled and more complex workflows any third-party BPM solution can be connected to ECM-Suite via the ECM-Suite Webservice API.

ERP - INTEGRATION

From out-of-the-box integration solutions for Microsoft Navision or ADDISON to project-specific solutions, with the highly customizable and generic approach available in the iworxs ECM-Suite you will be able to put things together to work so that records can be exchanged across applications. With the easy-to-use SOAP-based Application Programming Interface you or your system solution provider can implement with low effort and in a short time a seamless integration into the iworxs Enterprise Content Management System.

AUTOMATION SERVICES

In the daily business many tasks need to be done interactively by user intervention as is necessary and indispensable for many issues. That's why the iworxs ECM-Suite offers a wide range of functions to help to get things done faster; but, many business processes can be automated. While complex processes require a BPM approach many other tasks can be automated by a simpler approach. For this purpose, the ECM-Suite offers a couple of ready-to-use automated processes like auto-import of documents from the file system or directly from common databases.
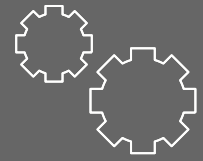
EXPORT SERVICES

With the Export Services you can automatically export documents by rules. This function enables you to pick and collect the required documents for publishing or to provide selected documents to your partners or clients so that they can fulfill their business needs. The Export Service is highly customizable. How Data is exported and delivered is customizable, hence many use cases can be addressed without creating and maintain complex induvial implementation.

CUSTOM FILE STRUCTURE

The iworxs ECM-Suite core system is based on a highly generic and customizable approach. The Suite comes with some ready-to-use file structures. The most common one is the Small Business file structure. Through a business rule injection approach customer can enhance the standard file structure to adapt the ECM-Suite for different use cases. In combination with the generic master data management customers are able to manage custom master data which can be used for many purposes like indexing and retrieval. To manage the master data, custom forms are created by the Active & Dynamic Forms Builder, without programming lines of source code. Additionally, customers can also create and integrate very individual clients who communicate with the ECM-Suite via the SOAP API.

All these techniques empower you to use the ECM-Suite as a Service respectively to adapt the framework to fit to your individual business needs. We of course will support you in all disciplines, from consulting, planning, customizing, programming, and deploying.