



DocMan

Electronic Document Management System

What is Document Management

- Document Management is the process of arranging documents in a way that is easily managed by individuals.
- A Document Management System/Software helps you organize your digital documents and digitize your existing paper documents to eliminate the clutter and issues of a disordered or manual system.

Why You Need Document Management

- ❖ To Eliminate paper-based filing systems
- ❖ To make working from anywhere easy and efficient.
- ❖ To safe-guard files from theft/damage/espionage.
- ❖ It makes it easy to scale your business with the changing times.
- ❖ To reduce space consumed by Manual Filing Systems
- ❖ Retrieve Documents Faster and more efficiently.
- ❖ To have more secure document access restrictions
- ❖ Improve work collaboration within your organization
- ❖ To improve document audit trails
- ❖ Eliminate duplicate Files/Folders

DocMan

- DocMan is a premiere document management solution that specializes in intelligent organization and automation of essential business documents and processes. It is a dynamic platform that operates both online and locally.
- More than simple storage of digital files, DocMan leverages a superior interface and quality of life features to make businesses more profitable by saving time and money.



**A Central Location
For All Your
Documents**



**A System Where
Documents File
Themselves**



**A Secure
File-Sharing
Platform**



Utilizing DocMan Workflows and Zonal OCR you're able to automate your processes



DocMan helps you intuitively upload, edit, and find your documents seamlessly, not just store them in folders online.



With military encryption, governance and permission tools, your documents have never been more secure

DocMan Features

- Smart Automation
- Workflow
- Secure Sharing
- File Request
- eSignature with KBA/OTP
- Dual Screen Previewing
- Faster Searching
- Advanced Version Control
- Form Creation
- Email Imports
- Access Links & Instant Sign-in
- File Search/Retrieval
- Desktop/Mobile App
- OCR
- Enhanced Security

SMART AUTOMATION

DocMan automatically recognizes, intelligently organizes, names, and stores your files using information contained in the files themselves.

TEMPLATES

- Checks
- Invoice
- Lacerte Tax Return
- Form - W2
- Form - 1040

Accountant Letter

FIELDS

- Name
- Address
- Email
- phone
- Date

Template: Form - 1040

Confidence Level: 92%

SMART AUTOMATION
Rubex automatically recognizes, intelligently organizes, names, and stores your files using information contained in the files themselves.

CREATE TEMPLATES
Make a template for any type of standard form so the software can recognize what type of document you're uploading.

PROFILES
Zonal OCR creates a profile for each document you upload, recording all the data in your chosen fields. Search full text for any profile item.

1040 U.S. Individual Income Tax Return 2018

Name: Bernie Branson
Address: 12345 Somewhere Lane
Date: 3-10-19

WORKFLOW

Workflows > New Client Tax Process

Workflow Name: Description:

Stage Title	Steps	Limit	Approvers	Expi...	Rej...	Appr...
Stage 1 Request Files		N/A	N/A	N/A	N/A	Next Stage
Stage 2 Move and review		N/A	N/A	N/A	#3	#4
Stage 3 Need More Documents		2 d	N/A	Repeat...	Repeat...	#4

Instances > New Client Tax Process - Joshua Benedict

Stage 3: Need More Documents. Remaining time: 1 d 23 h 59 m. Status: In Progress.

Request File External
Please request the files that are missing.

Timeframe
 Notify on C...

DASHBOARD
Review snapshots of ongoing workflows for an in-depth look at how your processes play out across your business. Drill down into specific workflow stages.

Visual Builder
Easily see how your workflow progresses.

Daily Completion
Last 7 Days: Mon, Tue, Wed

Day	Succeeded	Failed	Terminated
Mon	1	2	0
Tue	1	0	0
Wed	1	0	0

Current Snapshot

Category	Count
Reviewers	2
Test Group	1
Admins	1
Users	1
Rubex Demo	1

Time Spent
All Active

Workflow	In Progress	Awaiting Approval
Many Stages	11	2
Many Stages - Copy	4	4
Many Stages - Copy - L...	0	0
New Client Tax Process	2	1

Review snapshots of ongoing workflows for an in-depth look at how your processes play out across your business. Drill down into specific workflow stages.

SHARE

Share files directly from the interface, giving guest access for recipients to download files over a secure connection. Set the recipient's permissions, file/folder expiration, and the notifications you want to receive regarding the shared files.

The screenshot displays a file management interface. On the left, a file list is visible under the heading 'Client Folder' with the email address 'rubexsfdemo@efilecabinet.com'. The list includes folders for the years 2016, 2017, and 2018, and a PDF file named 'Rubex_TaxPrepChecklist.pdf' (124.45 KB). A context menu is open over the file list, with the 'Share' option highlighted. On the right, a 'Share' dialog box is open. It features a 'SMART, SECURE SHARING' warning box. The 'Shared Items' section shows 'Client Folder'. The 'To:' field contains the email address 'jbenedict@demo.com'. The 'Message:' field contains the text: 'Please Review the Tax Prep Checklist and upload your Tax Documents here. - Your Tax Accountant'. Below this, there are sections for 'Permissions' (Read, Write, Delete), 'Notifications' (Upload, Download, Delete), and 'Expiration' (April 15, 2019, with a 'Remove Access' option). At the bottom of the dialog are 'Cancel' and 'Share' buttons.

FILE REQUEST

The screenshot displays the File Request interface. On the left, a file explorer shows a 'Client Folder' for 'rubexsdemo@efilecabinet.com'. A context menu is open over a file named 'Rubex_TaxPrepChecklist.pdf', with the 'Request Files' option highlighted. The main area shows a 'New Request' form with the following details:

- Request Template: [Dropdown]
- Destination: Client Folder [Change]
- To: [Dropdown]
- Subject: Tax Documents
- Attachments: Rubex_TaxPrepChecklist.pdf
- Message: Please Review the Tax Prep Checklist (attached) and upload your Tax Documents here. - Your Tax Accountant
- Timeframe: April 15, 2019 (Year: 0, Month: 0, Day: 14)
- Notifi on Completion: [Checked]

Below the form, there are sections for 'Files To Request' with the following items:

- W2-2018: [Required] [Rename]
- 1099-C: [Required] [Rename]
- 1099-G: [Required] [Rename]
- 1099-MISC: [Required] [Rename]
- 1099-S: [Required] [Rename]

A callout box titled 'FILE REQUESTS' states: 'Send file requests to clients and other outside parties, granting them guest access to automatically rename and upload specific files directly to a folder you choose.'

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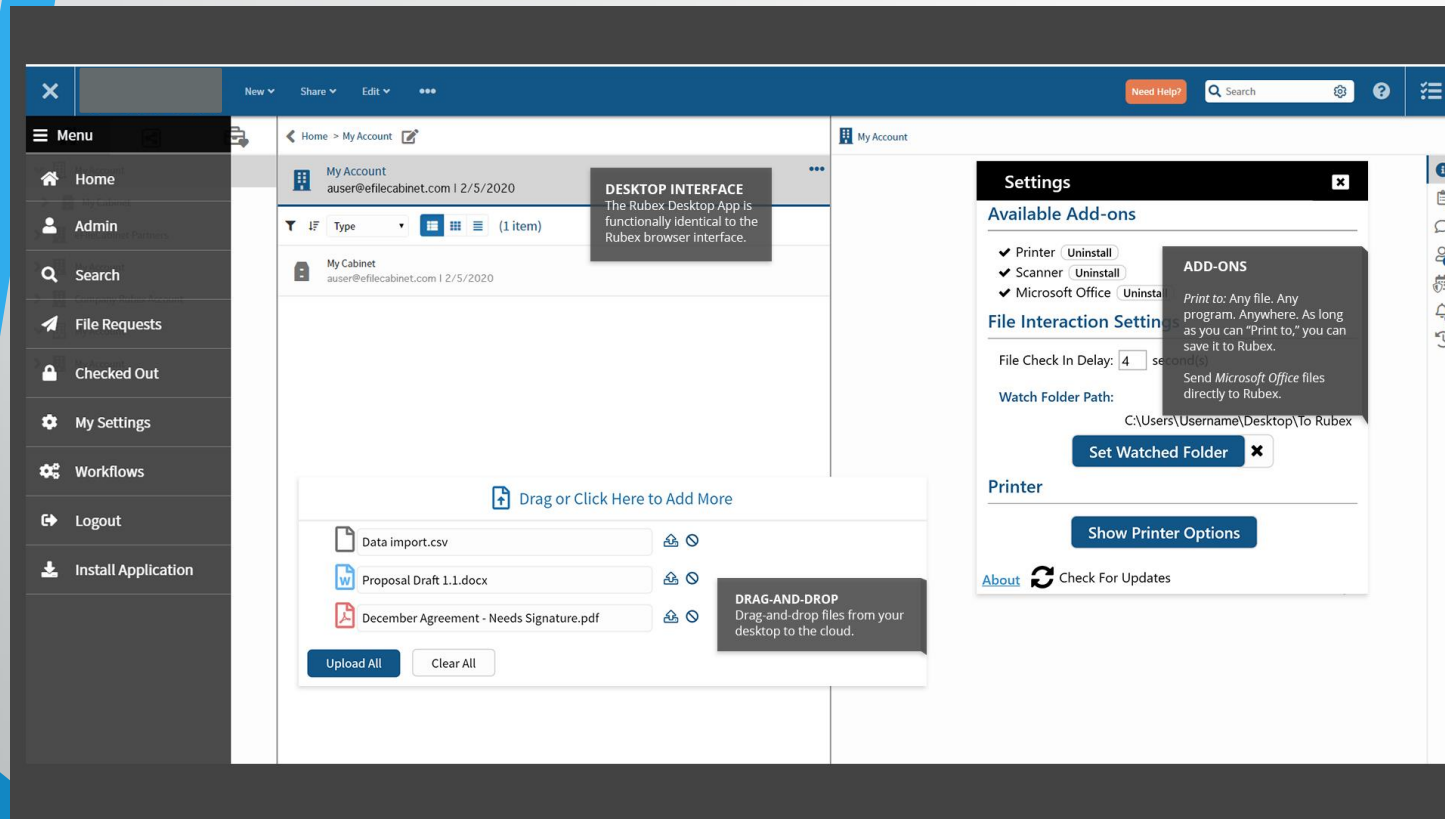
eSIGNATURE WITH KBA/OTP

Send secure signature requests to anyone for any document. Save and secure your signed documents anywhere in your system along with a separate audit trail document, making it one of the safe and compliant forms of electronic signature. Secure signature transactions with Knowledge-based Authentication (KBA) or One Time Passcodes (OTP).

The screenshot displays the e-signature software interface with several key components:

- Add Signer Panel:** Shows the process of adding a signer with fields for email, first name, and last name. The 'Authentication Options' section is highlighted, showing 'None' and 'KBA' (Knowledge-based Authentication) selected.
- Prepare For Signature Panel:** Displays document details such as '2011_W2.pdf + Additional Docum', the signer 'Alice Reynolds', and options for storing the signed document and audit trail.
- Document Preview:** Shows a preview of a W-2 form with a 'REQUEST THE SIGNATURE' overlay. The overlay contains instructions: 'Drag-and-drop signature fields anywhere on your PDF, and your signers will just need to click to add their signature.' A 'Sign' button is visible.
- Workflow View:** Shows a workflow for 'ContractProposal.pdf' with a 'Sending for Signature' stage. The status is 'In Progress'.
- Authentication Callouts:** Several callout boxes provide additional information:
 - 'AUTHENTICATION Use multi-factor authentication to keep signatures private.'
 - 'SET UP YOUR REQUEST Add multiple signers. Choose if you want the signed PDF to replace the old file as a new version, or saved as copy elsewhere.'
 - 'SIGNATURE REQUESTS To request an eSignature, simply right-click on the PDF document you'd like signed.'
 - 'ESIGNATURE IN WORKFLOW Add signature requests to automated workflows to further streamline your signing processes.'

DESKTOP/MOBILE APPLICATION

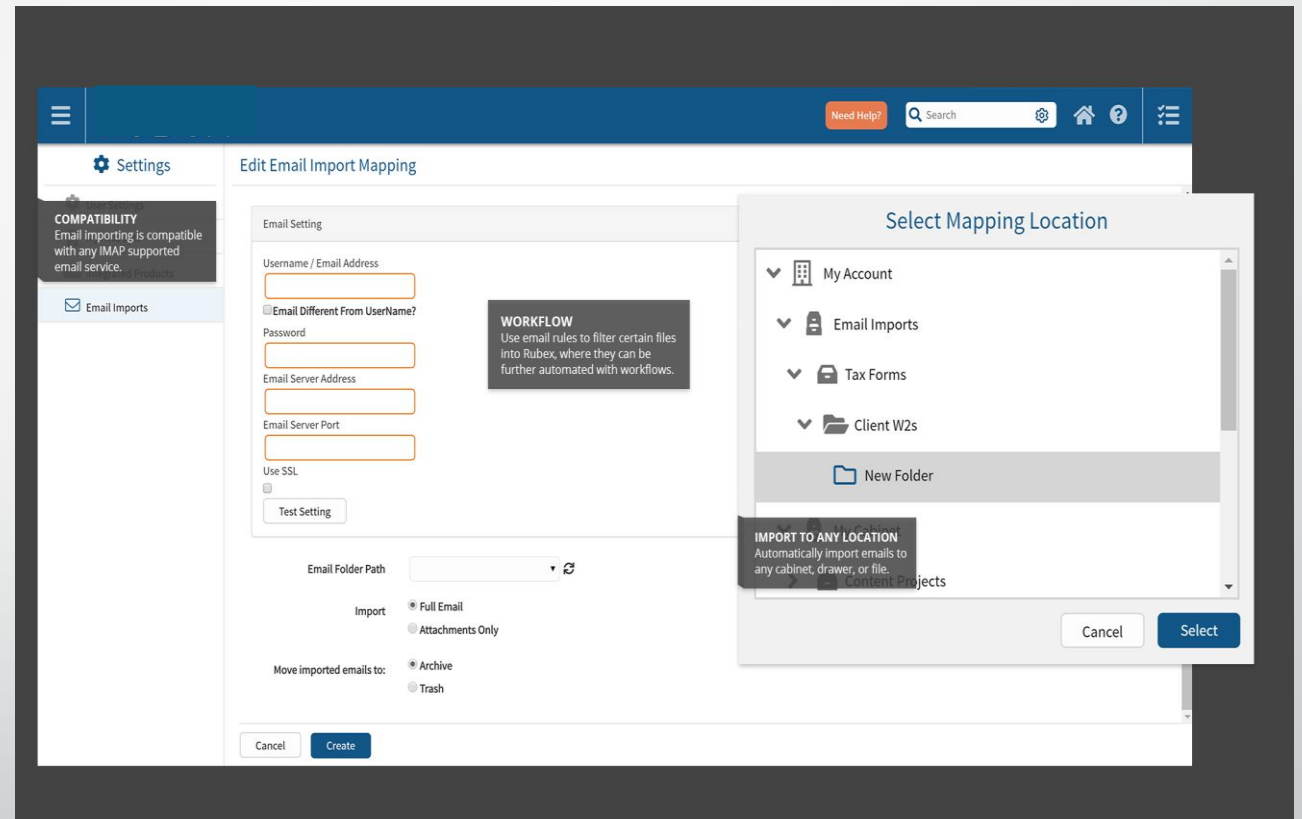


DocMan is accessible from both your web browser and a unique desktop application, so you can control your document management the way you prefer. Our Mobile App makes it easy to access files from anywhere, making work seamless and easy.

EMAIL IMPORTS

Map a location in your DocMan account to automatically import email messages and/or attachments from your email account inbox or the folder of your choosing.

DocMan also integrates with Google Drive and Microsoft OneDrive, to transfer files directly to your system.



ACCESS LINKS/INSTANT SIGN-IN

The collage consists of five screenshots from a software interface:

- Top Left:** A 'Share' dialog box with 'Email' selected. It shows 'Shared Items: Tax Documents' and a URL: `https://v953w.app.goo.gl/FGSL`. A tooltip for 'ACCESS LINKS' explains that these generate a URL for multiple platforms. Below, 'SECURE LINKS' allows setting an expiration date (April 23, 2020) and 'Uses Remaining' (30). Buttons for 'Cancel' and 'Update' are at the bottom.
- Top Middle:** A 'Share' dialog box with 'Link' selected. It shows 'Shared Items: Tax Documents' and a recipient email: `awilliams@efilecabinet.com`. The subject is 'Log into Rubex' and the message is 'Click the button below to log into my Rubex Account.' There is a checked 'Grant Instant Sign-In' option and a 'Permissions' section with 'Read' checked. Buttons for 'Cancel' and 'Share' are at the bottom.
- Top Right:** A 'Share' dialog box with 'Link' selected. It shows 'Shared Items: Sample Return 4.pdf' and a recipient email: `user@gmail.com`. The subject is 'You have a new share' and the message is 'The following items have been shared with you'. There is a checked 'Grant Instant Sign-In' option and a 'Permissions' section with 'Read' checked. Buttons for 'Cancel' and 'Share' are at the bottom.
- Bottom Left:** A 'Create Instant Sign-In Link' form. It has fields for 'To' (awilliams@efilecabinet.com), 'Subject' (Log into Rubex), 'Uses Remaining' (No Limit), and 'Expiration Date' (April 23, 2020). A 'Content' field contains the instruction: 'Click the button below to log into my Rubex Account. This link was generated by Amanda Williams.' Buttons for 'Close', 'Get Url', and 'Send' are at the bottom.
- Bottom Right:** An 'Edit Instant Sign-In Link' form. It shows the recipient email (awilliams@efilecabinet.com), 'Uses Remaining' (No Limit), and 'Expiration Date' (April 23, 2020). Buttons for 'Close' and 'Update' are at the bottom.

When you need to give faster and easier access to clients or coworkers, create direct links that will give them immediate access to files and folders. Either send a link directly to their email, or generate a URL to share over other text or instant messengers.

FILE SEARCH/RETRIEVAL

Easily check multiple folders or drawers for items that should be in them. Using your templates for your most common folder types, run a search on which folders are missing the searched item.

The screenshot displays a 'Search Results' interface with several key components:

- Search Bar:** A search input field with a magnifying glass icon and a 'Search' button.
- Advanced Search Options:** A section with checkboxes for 'Name', 'Profile', 'Created By', 'Comment', 'Full Text', and 'Path'. Below this, there are radio buttons for 'Missing Item Search', 'Template Missing Item Search', and 'Container Missing Item Search'. A tooltip titled 'MODIFY YOUR SEARCH' explains that different modifiers can be used to search for documents missing profile data, comments, etc.
- Advanced Search Criteria:** A section with 'And' and 'Type' dropdown menus. A tooltip titled 'CONTAINER SEARCH' explains that this option allows selecting specific containers to run a search, scoping through all contained subfolders.
- Select Smart Search Path:** A dialog box showing a list of folders (e.g., '3D RESEARCH PARTN...', '248 HIGH STREET, LLC', '289 AYER, LLC') and a corresponding list of search results (e.g., '3D RESEARCH PARTNERS, LLC', '248 HIGH STREET, LLC'). A tooltip titled 'TEMPLATE SEARCH' explains that this option runs a Missing Item Search using templates, searching all folders created with that template.
- Search Results:** A section at the bottom that currently displays 'No Search Results to Display'.

FORM CREATION

The screenshot displays the DocMan interface for creating and filling forms. The main window shows a 2019 Form 1040 PDF with various fields highlighted in yellow, indicating they are fillable. The interface includes a 'Form Designer' tab and a 'Form Fill' tab. A 'FORM FILL' tooltip explains that users with permissions can fill out fields in the document, and a new version of the document containing the form data will be created. A 'FORM DESIGNER' tooltip states that form fields can be added to PDFs by clicking and dragging, and their placement, size, and type can be adjusted. A 'SEND A FORM FILL REQUEST' tooltip describes the process of sending a form to be filled, selecting a recipient, and adding document fields and their locations. The interface also shows a 'New Request' dialog box with fields for recipient, subject, and attachments, and a 'Request Documents' section with a table of document requests.




FORM FILL
Users with permissions may fill out the fields in the document. A new version of the document containing the form data will be created.

FORM DESIGNER
Add form fields to PDFs by clicking and dragging. Adjust placement, size, and type of field. Tie fields to corresponding profile line items. Save forms and/or fields as templates.

SEND A FORM FILL REQUEST
Send a form to be filled. Select a recipient with document fields added and the location where the new files will be saved. Recipient will receive an email and in-system notification. Once request is fulfilled, the file is saved to the chosen location.

Design and create your own fillable forms with your PDFs, directly from DocMan. Send to clients and colleagues to fill, and you collect the information. No more manual data entry, and even better, use that data to automate the routing of documents for efficiency and compliance.

HERO PROGRAM

SALES PROCESS AGREEMENT SIGNED	Implementation 	Optimization 	Support 
	<ul style="list-style-type: none">• Welcome/Introduction call• Goal/expectation alignment• User setup• Initial training• Upload documents/Import data• Sidekick installation• Zonal installation and setup• Initial workflow creation• Template creation	<ul style="list-style-type: none">• Review current status• Resolve usage concerns• Discuss document (desired) flows• Create, test, review, and go-live for workflows• Additional user training• Multiple touch points along the journey• Additional use-case optimization of eFileCabinet	<ul style="list-style-type: none">• 1:30 phone response time / :10 chat response time• Email/Phone/Chat support• Ongoing training• All system updates• Release notes• User guides• Training videos online• WalkMe-In software guide

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Customer Success Manager

Support

365 Days of Success



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