InstaFile

Complete Document management System

Index :

1.1 What is InstaFile?

InstaFile Document Management System is user friendly, browser based comprehensive Enterprise Document Management Solution available through Local Install as well as "SaaS" (Software as a Service) model. It empowers organizations across verticals to manage lifecycle of any type of electronic documents. DMS provides a unique repository for storing, retrieving, organizing and routing of electronic documents.

DMS integrates diverse data transacted across the organization with ease. DMS's superior technology integrates configurable workflows and embeds document management ensuring that documents in all forms are digitized, indexed, archived, search enabled and globally accessible.

DMS's state of the art technology embedded with document management and advanced workflows enables enterprises to digitize documents and automate the business processes to increase efficiency. DMS empowers you to access and manage your documents in a secure environment from any location in the world.

By using DMS, users can significantly increase the efficiency of Document Management, retrieval and archival thereby save time and significantly reduce expenses on storage space, sharing, printing and maintenance.

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1.2 How does it work?

With the help of Document Management software it is possible to have the right information in the right place at the right time. That is the basis for the decision-making procedure and thus the triggering of business processes. The faster the correct information is available, the faster can decisions be made - or more decisions and business processes in the same time span.

Document management typically begins with using a scanner to convert paper documents into digitized images. Once all files are electronic, it is easier to organize the information. In addition, where possible, all new documents are prepared and saved in a permanent digitized format.

Today, information is often already available in electronic form - such as e-mails or Word files -, but naturally also in the classic paper-based form. The digital archiving of the Document Management software stores these documents in a central archive, which is accessible to everyone via the network. Every piece of information concerning the documents is stored in a database, starting with the creation date over the type of document .

The Document Management software later finds the archived document at any time, based on the stored information. This is usually much faster than looking for the originals – that is to say within seconds.

1.3 Where you can use InstaFile?

An effective document management system helps companies become better organized by making it easier to file, share, retrieve, and secure information. Employees can also be more productive since they save time searching for business critical information. A good document management system also facilitates collaboration, decision, and the ability to build upon the work of others.

Here are a few of the businesses that currently use the InstaFile solution:

- Attorneys / Lawyers/ Law Firms
- Real Estate Agencies
- Title Insurance Firms
- Insurance Companies
- Medical Institutes
- Brokerage Firms
- Municipal Courts
- State and Local Government Agencies
- Schools, Colleges, Universities
- Share & Stock Brokers
- Mortgage Brokers
- Home Inspection Companies
- Banks/Back Office Automation
- Health care Providers
- Financial Institutes
- Police Departments
- Pharmaceutical Firms

1.4 Why only InstaFile?

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The InstaFile DMS features the storage, search, distribution, retrieval, retention, routing, approval, and versioning of documents. It offers customers the ability to establish a secure, effective, and compliant framework for managing documentation assets.

The InstaFile DMS is most beneficial for organizations that must centralize the storage and retrieval processes of all their documentation items. Moreover, the system audits all activities, enables content collaboration and routing, defines access rights, and controls document versions (work in progress) and revisions (released and approved documentation), among other functionalities.

2. InstaFile features and benefits:

Features:

Organize and share electronic documents: InstaFile manages any type of electronic document in any file format. You can organize electronic documents into hierarchies of folders.

Apply custom metadata to documents: InstaFile lets you associate extra information, called metadata, with documents. Metadata is indexed and can be used to easily retrieve and generate reports on documents based on your custom criteria. Each piece of metadata information is an attribute, and sets of attributes can be grouped into categories that can be associated with any document. You can also add to your attributes, which improves the accuracy of attributes and enhances query precision.

Use permissions to fine-tune access to documents: You can set up permissions on a document in the Document Management repository. This helps you fine tune the type of access that you want to grant to individuals and groups based on corporate policies. For example, some users may not have the permission to even see a document, others may have the permission to only view a document, and others may be able to modify or delete a document.

Audit all document events: Use Document Management's comprehensive audit trail functionality to automatically record the date, time and performer of every type of event that can be performed on a document. Events that can be recorded include document creation, renaming, Check-in/Out or Search, adding or deleting versions, viewing and so on.

Find documents with simple search: InstaFile Web interface includes a simple search bar on every page that supports full-text or natural language querying within the folder or across the entire repository. Meta data search is also great asset for this document management system.

Control and manage document versions: Control document versions and prevent multiple authors from overwriting each other's work. Users can access the complete version history of a document and view the content of previous versions.

Collaborating on Documents: The ability to distribute and share documents is inherent in the InstaFile DMS. Documents may be retrieved by an authorized user and worked on. Users may share one or multiple documents with one or many recipients. When a document is shared, both

system and email notifications are sent to the recipient(s) with a link to the sent document.

Benefits:

- ➢ Disaster Recovery
- ➢ Cost Containment
- ➢ Security Enhancement
- ➢ Document Management as a central Repository
- ➢ Easy Access
- ➢ Process Consistency
- ➢ Rapid ROI
- ➢ Preserve Intellectual Capital - Organizational Knowledge
- ➢ Multi-Language Support for today's global economy

3. Start Up with InstaFile:

InstaFile is a simple User interface easy to understand and manage the documents. Admin has a rights to create accounts with specific roles and permissions for particular group of users. After creation of account user will land to experience totally new way to manage documents.

4. InstaFile Layout structure:

Layout structure is flexible contains different tabs based on role specified to user. Departments assigned by admin.
Features can be turned on/off by admin to users to make the system more robust & secure. In future Layout will be completely changed to Windows 8 theme where the present generation is seeking attention.
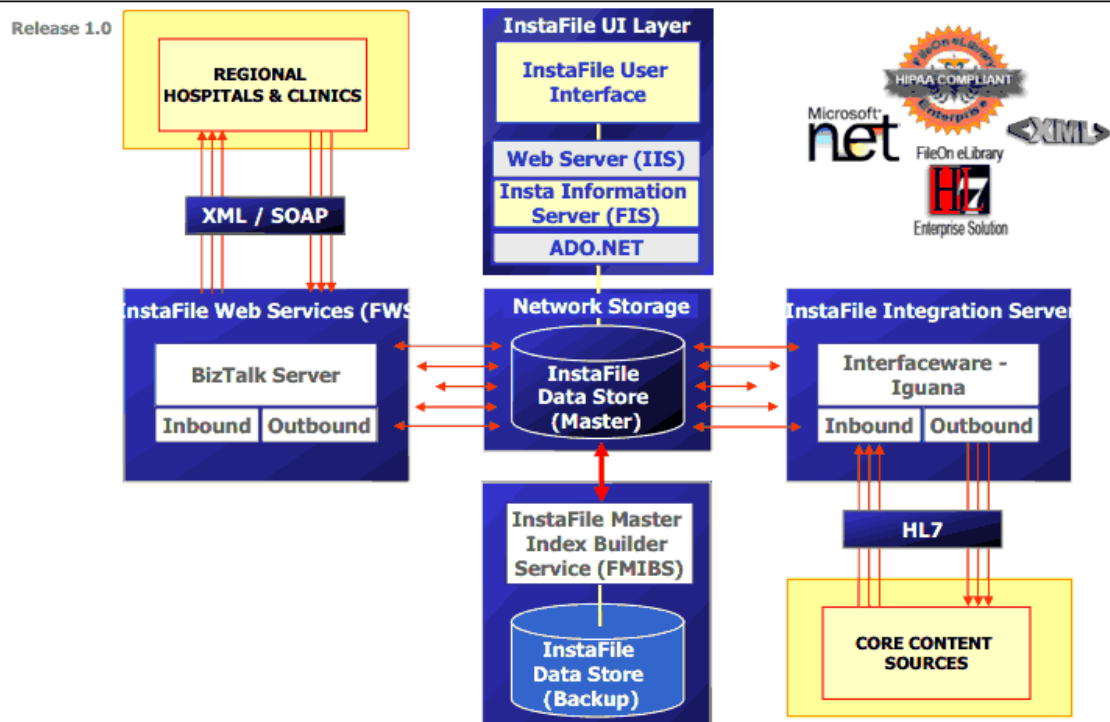
Architecture Overview

Release 1.0

REGIONAL HOSPITALS & CLINICS

XML / SOAP

InstaFile UI Layer
- InstaFile User Interface
- Web Server (IIS)
- Insta Information Server (FIS)
- ADO.NET

InstaFile Web Services (FWS)
- BizTalk Server
- Inbound | Outbound

Network Storage
- InstaFile Data Store (Master)

InstaFile Master Index Builder Service (FMIBS)
- InstaFile Data Store (Backup)

InstaFile Integration Server
- Interfaceware - Iguana
- Inbound | Outbound

HL7

CORE CONTENT SOURCES

Microsoft .net
HIPAA COMPLIANT
FileOn eLibrary
XML
HL7 Enterprise Solution

5. InstaFile eLibrary:

eLibrary Of Instafile is a basic feature for every user who can access Instafile. But the flavors of instafile access will be limited by admin in order to safeguard the privacy. It contains different features to manage, search, add, delete and collaborate among different users in an organization.

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6. InstaFile Functionality Overview:

InstaFile is user friendly and powerful Document Management System incorporates an easy to use, intelligent enterprise document management service that digitizes all the unstructured data and makes it easily accessible and searchable instantly at a click – making seamless communication a reality.
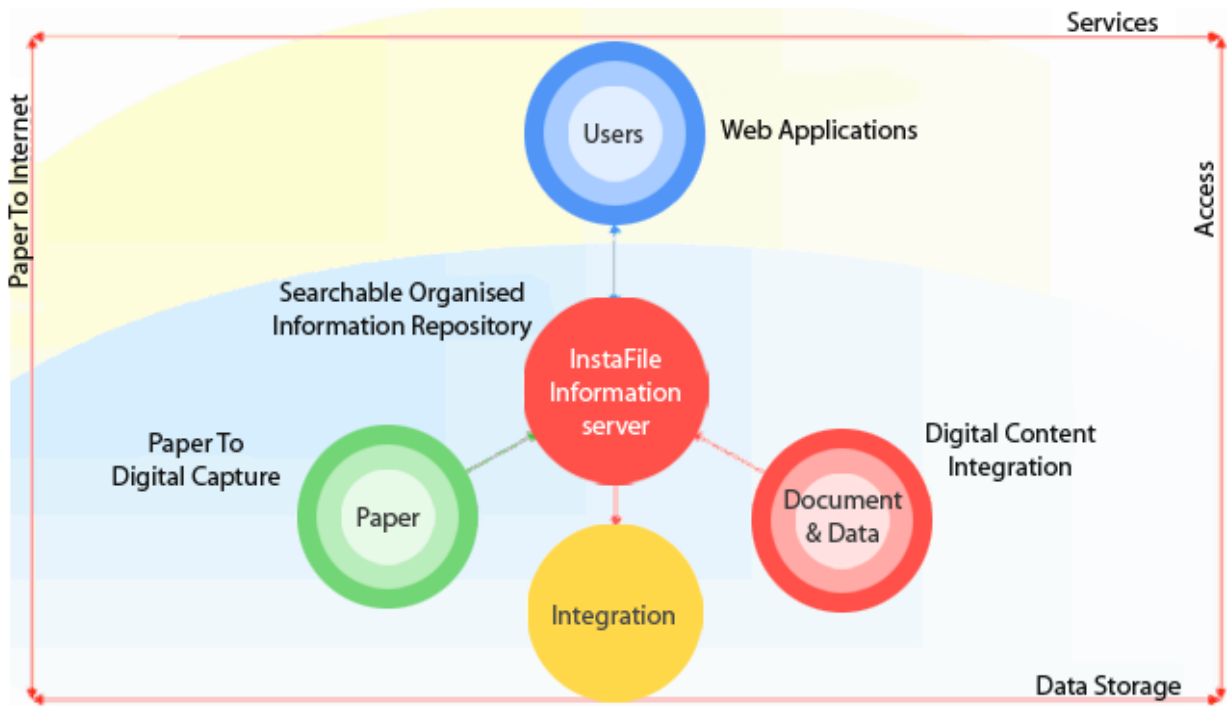
6.1 Log-in/Log-out:

InstaFile can authenticate users from LDAP allowing administrators freedom to maintain one user id and password for each user. With many applications that require authentication, LDAP authentication is a powerful mechanism.

Once the admin creates the Logins for users. User can access the system with specific id & password. Once the user is completed with work he can logout from current session.

6.2 eLibrary:
6.2.1 View a File:

Once the files are uploaded or scanned into repository their is a option to view a file. It supports many formats of files. Opens files in its own native format. Provides features to add new versions and to add comments.

6.2.2 Upload a File
6.2.2.1 Drag & Drop/Upload:

Instafile offers two ways to upload a document in to repository. One is through Drag & Drop and other is through providing upload button in eLibrary Tool bar.
At a time maximum of 10 files can be uploaded in to a system. Files can be dragged into a folder. Maximum up to 20 Mb of file can be uploaded. Uploaded files can be Searched by using search Function.

6.2.3 Download a File

Instafile provides flexible ways to download a single/Multiple files. Single file can be downloaded directly whereas multiple files will be downloaded in Zip format in order to reduce the memory. User needs to unzip the file and work on the specific documents.

6.2.4 Share a File:

Collaboration in the organization is provided by share feature. Files can be shared within the Departments or users by using this feature. Owner of the file has permission to remove the users after the completion of work. When user shares file to single user or multiple users notification will be sent to them.

6.2.5 Creating New Folder:

Folders are created in order to have systematic and hierarchical document flow. Duplicate of folders are eliminated in this system. Provided ground to create N number of folder in different departments and user own documents.

6.2.6 Move:

By this Move functionality user can move the documents or folders around the work space. List of folders and departments will be shown on destination part for the user to move the documents.

6.2.7 Delete:

Users have option to delete the files but they are not permanently deleted. Admin of an organization will have a set of deleted documents of all users in an organization. If the admin delete those documents then the documents will be permanently deleted from the repository. Admin will be notified by alerts if the files are deleted by users. Recover option is provided on deleted files on user Request level.

6.2.8 Recycle Bin:

Recycle Bin is familiar feature. All deleted documents will be stored in recycle bin. Recycle bin feature depends on organization interest to provide only for Admin or for all users in an organization. Search functionality is provided to search deleted documents.

6.2.9 Recover:

As stated above Recover functionality is provided on deleted documents. On user request documents will be recovered.

6.2.10 Re Assign:

Re Assign feature helps to keep track of documents of hierarchy level for different users. For an

example if user is leaving from organization mailing or sharing whole documents is time factor so user can use reassign feature to assign whole documents in one go to specific user by selecting from user list.

6.2.11 Properties:

Documents have their specific properties without viewing the file user can get generic information about the document by seeing the properties of a document. Properties include date of creation, author and some other features which helps in getting information in one glance.

6.2.12 Rename:

Renaming of documents or folder is provided by Rename feature. User can change the name of document or folder multiple times depending on requirements. Duplicates are avoided.

6.2.13 Email:

Email feature is similar to share but in Email we will completely mail the documents to a specific user. We don't have permission remove the access as in share. Documents can be mailed to multiple users or groups.

6.2.14 PDF Splitter:

Instafile provides most powerful feature while other document management systems lack. Pdf files can be split by Pdf Splitter. Pages can be split into one group and can be saved & viewed.

6.2.15 Check-Out/Check-In a File:

Instafile Provides robust feature in terms of security. Once the user has done work with particular document he can prevent access of a file from other users by checking out in other words locking the document. Checkout can be done by keeping copy in the system. once the file is checked out user cannot access the file until it is checked in .

6.2.16 Archive/Unarchive a File:

Older files in Instafile system can be archived to separate feature called Archive. Archive contains all the files which are not user for specific time period set by an organization which is called Auto archive. Documents in Archive can be unarchived once they are unarchived they will be stored in root of documents repository.

6.2.17 Add a file to Work Flow:

User can add file from eLibrary directly to workflow or can assign workflow from workflow module. User will be notified by workflow Alerts if any new workflow assigned. When the workflow is accepted or Rejected owner will be notified by workflow alerts.

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6.3WorkFlow:

6.3.1 Add Workflow:

User can assign workflow from Workflow module. Here user creates workflow by adding title, subject, time period for approval. Time period can be Timecycle, weekcycle, Month cycle, Annual cycle. No: of Approver can be added and they can be set as Mandatory approver. Once the Mandatory approver accepts the file then the files will be released from workflow or stores into repository.

6.3.2 Edit Workflow:

User can edit the workflow and can update the workflow. Once the workflow is updated the selected approvers will get alerts to take action regarding it.

6.3.3 Disable Workflow:

User can Disable the workflow in order to avoid any changes on it to make. Once the owner disables the workflow then selected approver side workflow will be disabled until owner takes any action.

6.3.4 Enable Workflow:

User enables the disabled workflow by enable feature. Once the file is enabled selected approvers side workflow will get enabled and now they can perform any action it.

6.3.5 Delete Workflow:

User Can delete the workflows by using this delete option. Owner of workflow has permission to delete the workflows. Approver list doesn't have permission to delete the workflows.

6.4 Dashboard:

6.4.1 Activity Report:

InstaFile Provides tracking of events performed on documents. This feature helps individual user to check activity report by selecting the date range. All the events performed by user on documents will be tracked and shown in Report.

6.4.2 Audit Report:

Audit report contains whole events information of user. Admin have special privileges to check the Audit report of selected users. By selecting User in Edit box user events information will be

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displayed.

6.4.3 Virtual Report:

virtual report shows the memory available for particular user. It indicates with graph the percentage of memory used and left.

6.4.4 Storage Report:

Storage report contains the number of files and folders in user repository. It also specifies storage used.

6.5 User Administration:

Administration feature enhanced with security roles, departments, groups and provide extreme security for the usage of system. Administrator adds user with respective role and sets permissions to access the Documents.

6.5.1 Add User:

By using Add user Admin can add the users with specific security role and departments.

6.5.2 Site Configuration:

It contains different roles, departments, groups configuration features.
Admin can set the level for users based on their designations in the organization.

6.5.3 Checkin/Out Configuration:

Admin sets checkin/out configuration which contains time period of auto renewal and mail configuration.

6.5.4 Metadata Configuration:

Admin adds Metadata in metadata configuration for different level of departments. Based on different roles metadata can be set.

6.5.5 Site Email Configuration:

Depending on Organization, Mails can be customized according to their requirement. Message included in Mail can be organized by using this feature.

6.5.6 Login Page Configuration:

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Login page can be customized according to Company Standards by using this feature. Logo can be added. Images can be uploaded and this feature provides full flexibility to design own login page.

6.5.7 Maintenance:

Maintenance provides features to set the Auto cleanup, Temporary files cleanup. It also provides admin to set Auto archival period. Country and state can be set up this feature.

6.5.8 Account Information:

User has his own account information on the right side of his launching screen. From this user can edit or even change password from this feature.

7. IT Infrastructure Requirements
7.1 Server Specifications
7.1.2 Software Requirements

Stand-alone server:

- ➢ Windows XP or above -- minimum requirement
- ➢ The 32 / 64-bit edition of Windows Server 2008 Standard with SP2-- Preferred
- ➢ Web Server (IIS) role, IIS 6.0 and above.
- ➢ Application Server role
- ➢ Microsoft .NET Framework version 3.5 SP1
- ➢ SQL Server 2005 / 2008 Express with SP1(free version)
- ➢ SQL Server 2008 Native Client
- ➢ Microsoft SQL Server 2005 / 2008 Analysis Services ADOMD.NET
- ➢ ADO.NET Data Services v1.5 CTP2

7.1.3 Hardware Requirements:

- ➢ Processor:32 / 64-bit, dual processor, 3 GHz
- ➢ RAM: Minimum 4 GB for stand-alone or evaluation installation
- ➢ Preferred - 8 GB for single server and multiple server farm installation for production use
- ➢ Hard disk:250 GB for OS, Database and app server
- ➢ Mapped SAN storage (currently called S drive at BP) minimum 500 GB
- ➢ Other: DVD drive
- ➢ The server needs to be connected to the same network as the users and the 'S' drive should be mapped to be connected and available at all times for access from this server.
- ➢ Remote Desktop access should be enabled for remote installations and setup to be done.

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7.2 User Machine Specifications
7.2.1 Hardware:

Processor: 32 / 64-bit, dual processor, 3 GHz.

7.2.2 Software:

Operating systems
  ➢ Windows 8/7/XP, Mac, IOS

Supported Browsers:
  ➢ Mozilla Firefox: 12 and above.
  ➢ Internet Explorer: 9 ad above.
  ➢ Google chrome: 17 and above.
  ➢ Safari: 5 and above.
  ➢ Opera: 10 and above.

8. Hardware, Software & Operations:

InstaFile has developed relationships with equipment manufacturers, suppliers, resellers and support organizations in your area. If you need support on any aspect of InstaFile Services, Hardware, Software or Operations, support is available by calling InstaFile Support Hotline: +1 (203) 654 7777. E-mail support is available to you 24x7; please send your support requests to support@instafile.net

9. Installation:

Installation is provided by proficient team of technical people who work with installation set ups to ensure installation is Robust and secure.

10. Training:

Training on InstaFile will provided by Technical staff to make user proficient in using. Training is provided on Request.

11. Post Go-Live support:

A Team will be supporting the Organization for Maintenance and queries regarding features of InstaFile Document Management System.

12. Summary:

Organizations have different strategies in using the Document Management system. We will help in customization of product to their own needs and Requirements. Our Goal is simple to make

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organization reduce cost factors, Maintain right flow of information and users collaboration.

We strive for product Quality, as Quality matters and differs from other document management system products in present competitive world.

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