



EXECUTIVE INTRODUCTION TO ISOFT DMS

ISOFT DMS

Document management with **organisation**, **security**, **automation** and **control over your data**.

PURPOSE

ISOFT DMS organises, stores, tracks and manages your organisation's electronic documents on one platform, on your own servers or on iSoft hosting.

KEY THEMES



Organise



Protect



Automate



Collaborate



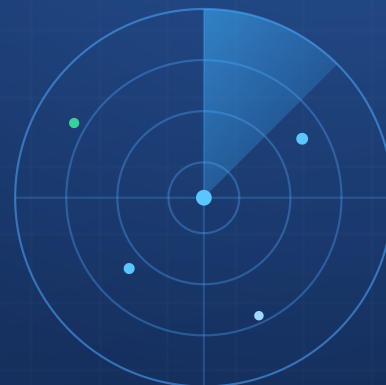
Control

iSOFT DMS IN ONE PAGE

Executive Overview

A CONTROLLED VIEW OF THE ORGANISATION'S DOCUMENTS

iSOFT DMS brings the organisation's contracts, invoices, letters, orders, proposals, meeting notes and any other document together in one place. Every document is indexed, protected by access rights and kept until its retention date.



THE VALUE FOR LEADERSHIP

Clearly organised and instantly available information is the key to successful business processes.

LEADERSHIP QUESTION	WHAT ISOFT DMS ANSWERS
Where are our documents?	In one organised archive, with personal and team folders, tags and search.
Who changed what, and when?	Every creation, change, share and comment is in the activity log.
Who can see each document?	Access rights and sharing rules set by the administrator.
Can we approve and sign without paper?	Yes, with approval workflows and digital signature, integrated with DocuSign and LibreSign.
Do we meet retention periods?	File retention and deletion are controlled with tags.
Where is the data kept?	On your own servers or on iSoft hosting. The choice is yours.

This is not just a shared folder. It is a **document management system** with rules, history and control.

DOCUMENTS GROW FASTER THAN THE ORGANISATION

The Document Challenge

SCATTERED INFORMATION COSTS TIME AND RAISES RISK

Contracts, invoices and correspondence arrive by email, on paper and in folders spread across many computers. As the organisation grows, finding the right version and knowing who accessed it becomes difficult.



Scattered documents

Files in emails, local drives and shared folders, with no single place and no common organisation.



Confusing versions

Several copies of the same document circulate at once, and it is not clear which one is final.



Uncontrolled access

Sensitive documents are shared without clear rules, and it is hard to know who accessed them.



Slow approvals

Approvals and signatures depend on paper, travel and manual follow-up.

THE RISK FOR THE ORGANISATION

When documents are scattered, decisions slow down, audits become difficult and retention periods may not be met.

AN ORGANISED AND SECURE DIGITAL ARCHIVE

What ISOFT DMS Is

FROM CAPTURE TO COLLABORATION

ISOFT DMS is a document management solution deployed and supported by iSoft. It follows every document from capture to archive.



Easy capture from all sources

The place to keep contracts, invoices, letters, orders, proposals, meeting notes or any other business document.



Index and authorise

Classify documents and index information in a few clicks. Then share them with controlled access rights and permissions.



Secure, organised archive

Every document is safe and protected in the archive, with controlled access rights, until it reaches its retention date.



Access and collaborate

Find information quickly and simply; edit and comment on documents or process them in workflows.

EVERY DOCUMENT'S PATH

Every document follows the same controlled path, from the moment it arrives to the end of its retention period.



ISOFT DMS brings content search with OCR, security and compliance, document management, team editing, collaboration and sharing together on one platform.

LESS MANUAL WORK, MORE CONTROL

Automation and Compliance

WORKFLOWS, APPROVALS AND RETENTION

ISOFT DMS makes it easy to automate repetitive and tedious tasks and to create efficient workflows between teams, without programming.



Automated workflows

For example, convert a document to PDF when a tag is added, or post a message in the team chat when a partner uploads files.



Approval and digital signature

Simple approval workflows for teams and signing of important documents by management, with DocuSign and LibreSign integration.



Document retention

File retention and deletion are controlled with tags, to meet legal or practical retention requirements.



Audit trail

Each document's timeline shows who created, changed, shared or commented on it, and when.

BEFORE ISOFT DMS

Documents spread across emails and local folders.

Paper approvals, with travel.

Nobody knows who changed the document.

AFTER ISOFT DMS

One archive, with team folders, tags and search.

Approval and digital signature inside the system.

Every action is recorded in the document's timeline.

YOUR DOCUMENTS, YOUR RULES

Security, Control and Benefits



INSTITUTIONAL CONTROL OF DOCUMENTS

An organisation's documents are institutional information. ISOFT DMS keeps them where you choose and gives the administrator control over who has access, what is shared and what happens in the system.



Storage of your choice

On your own servers or on iSoft hosting.



Access security

Brute-force protection and two-factor authentication, required by group.



Delegated administration

Parts of the administration handed to specific groups, without full access.



Monitoring and logs

Server status and a log reader in the panel itself.

BENEFITS FOR THE ORGANISATION

● Organised information

Documents that are easy to find, with folders, tags and search.

● Less paper

Digital approvals and signatures, without travel.

● Compliance

Tag-based retention and an audit trail.

● Collaboration

Conversations, video meetings and documents in the same system.

● Flexible access

Processes keep running, even on the move or working remotely.

● Your own look

The system with your organisation's name and colours.

ISOFT DMS turns scattered documents into an **organised digital archive**, to **find, protect and share** your organisation's information.

