

ISOFT DMS

Feature Catalogue

Feature and sub-feature reference for ISOFT DMS

SCOPE This catalogue lists the features of ISOFT DMS in a compact format, organised by area, for technical teams.

WHAT'S INSIDE

Documents & Collaboration

Files, tags, sharing, activity

Automation & Compliance

Flows, approvals, retention, capture

Administration & Security

Access, delegation, apps, monitoring

Search & Security

Search, OCR, protection, access

Document Management & Editing

Versions, team folders, approvals, co-authoring

Collaboration & Sharing

Chat, tasks, links, guests

01 Documents & Collaboration

Software solution designed to organise, store, track and manage the electronic documents in your organisation. Clearly organised and instantly available information is the key to successful business processes.

Files and folders

PURPOSE All your documents in one organised place, with personal folders, team folders, recent files and favourites. Access them from the browser, wherever you are.

- Personal and team folders
- Recent files and favourites
- Search across files, tags and messages
- Document previews

Tags and classification

PURPOSE Classify documents with tags and find them quickly. Tags can also trigger workflows and retention rules.

- Collaborative tags shared by the team
- A view of every document with the same tag
- Workflows triggered by tags
- Retention and deletion controlled by tags

Controlled sharing

PURPOSE The administrator decides how documents can be shared: with users and groups, by link or with other clouds, with or without a password.

- Sharing with users and groups
- Password-protected share links
- Preview without allowing downloads
- Sharing limited to each user's groups

Activity log

PURPOSE Every change is recorded: who created, changed, shared or commented on each document, and when. It is the document's timeline, ready for audit.

- Each document's timeline
- Filters for file changes, shares, security and comments
- Your own activity and your colleagues'
- Audit trail

Communication and collaboration

PURPOSE Conversations, video meetings and documents in the same system. Schedule meetings from the calendar and mention colleagues to get their attention.

- Team conversations
- Video meetings
- Mentions and message reminders
- Meetings scheduled from the calendar

02 Automation & Compliance

Capture and indexing

PURPOSE ISOFT DMS is the place to keep contracts, invoices, letters, orders, proposals, meeting notes or any other business document.

- Capture from all sources
- Classification and indexing in a few clicks
- Sharing with controlled access rights and permissions
- Editing, comments and workflows on documents

Automated workflows

PURPOSE ISOFT DMS makes it easy to automate repetitive and tedious tasks and create efficient team collaboration workflows, without programming.

- Rule-based blocking of file access
- Automatic tag-based blocking of new versions
- For example, convert to PDF when a tag is added
- A message in the team chat when a partner uploads files

Approval and digital signature

PURPOSE Simple approval workflows let teams collaborate and management sign important documents.

- Simple approval workflows
- Document signing by management
- DocuSign integration
- LibreSign integration

Document retention

PURPOSE File retention and deletion can be controlled with tags, so legal or practical data-retention requirements are met.

- Tag-based retention rules
- Controlled deletion of files
- Legal or practical retention requirements
- Every document protected until its retention date

03 Administration & Security

Security and access

PURPOSE Brute-force protection, an allow list of addresses and two-factor authentication, which can be required for every account or for specific groups.

- Brute-force protection
- Allow list of IP addresses
- Two-factor authentication required by group
- Limits on repeated sign-in attempts

Delegated administration

PURPOSE Hand parts of the administration, such as support, email settings or sharing, to specific groups without giving them full access to the system.

- Administration sections delegated to groups
- Each team reaches only what it needs
- Sharing, email and background job settings
- Main administrators keep full control

Apps

PURPOSE Turn apps on or off to suit the organisation: activity, contacts, comments, file access control, reminders, document editing with LibreOffice and many more.

- Active and disabled apps on one screen
- Document editing with LibreOffice
- File access control
- Integrations and additional apps available

Your organisation's look

PURPOSE Give ISOFT DMS your organisation's look: name, web address, slogan, colours and background image, with links to the legal notice and privacy policy.

- The organisation's name and slogan
- Primary and background colours
- Links to the legal notice and privacy policy
- Visible to every user

Monitoring and logs

PURPOSE Follow the server from the panel itself and read system warnings and errors in the log reader, to spot problems early.

- Server load and memory charts
- Server uptime
- Warnings and errors by severity
- Sorting and filters on the logs

04 Search & indexing

Find any document by what it says, including scanned PDFs and images.

FEATURE	DESCRIPTION
Full-text search	Find documents by their content, not just by their name.
Dedicated search engine Elasticsearch	Fast search, even across large volumes of documents.
File content indexing	The text of every file is indexed automatically and appears in the results.
OCR for scanned PDFs and images Tesseract	Text recognition in scanned documents, so they become searchable.
Automatic OCR in workflows	Incoming PDFs get searchable text, with no manual step.
AI auto-tagging	Images and media files classified automatically by their content.

05 Security & compliance

File protection, control over who has access, and records for audit.

FEATURE	DESCRIPTION
File antivirus ClamAV (daemon/socket), ICAP	Every uploaded file is scanned for viruses and malware.
Server-side encryption	Files are stored encrypted.
End-to-end encryption	Sensitive folders encrypted on the device itself: not even the server can read them.
File access control rules	Block access by group, IP address, tag or time of day.
Audit logging	User and administrator actions are recorded for audit.
Retention policies	Automatic deletion of files by tag or by age.
Password policy and brute-force protection	Rules for strong passwords and blocking of repeated sign-in attempts.
Two-factor authentication TOTP, WebAuthn	One-time codes and physical security keys.
Single sign-on (SSO) OpenID Connect (e.g. Keycloak), SAML	Sign in with the organisation's account, through OpenID Connect or SAML.
LDAP and Active Directory	Users and groups synchronised with the organisation's directory.

FEATURE	DESCRIPTION
Suspicious login detection	An alert when an account signs in in an unusual way.
Watermarking and secure view	Documents opened with a watermark and without allowing downloads.

06 Document management

Versions, tags, team folders, workflows, approvals and signatures.

FEATURE	DESCRIPTION
File versions	Version history for every file: name the important versions and restore any of them.
Trash bin	Deleted files can be recovered.
Collaborative and system tags	Classify documents with team tags or tags set by the administrator.
File locking	Manual locking and automatic locking while editing, to avoid conflicts.
Team folders with permissions	Folders shared by groups, with detailed permissions (ACLs).
Rule-based automatic tagging	Tags applied automatically when a file matches a rule.
Workflow engine	Visual rules that automate actions on files, without programming.
Automatic PDF conversion	Documents converted to PDF automatically, by rule.
Approval workflows	Document approval requests, with approve or reject.
Electronic signatures LibreSign	Sign documents electronically inside the system.
Document templates	Create new documents from the organisation's templates.
External storage SMB, S3, SFTP, WebDAV	Connect storage you already have: SMB, S3, SFTP and WebDAV.
Previews	Previews generated in advance, so documents open faster.
Metadata and properties	See each file's metadata and properties.

07 Editing & co-authoring

Edit documents in the browser, with several people at the same time.

FEATURE	DESCRIPTION
Office documents in the browser Collabora Online	Documents, spreadsheets and presentations edited together, in real time.
Alternative document editor ONLYOFFICE	A second Office document editor, if the organisation prefers it.
Collaborative text editing Markdown	Notes and text documents edited together, in real time.
Whiteboard	A shared whiteboard to draw and plan as a team.

08 Collaboration

Chat, meetings, tasks, knowledge and calendar in the same system as your documents.

FEATURE	DESCRIPTION
Chat and video calls	Chat, calls, video and screen sharing.
Kanban boards	Organise tasks and projects in boards, lists and cards.
Team wiki	A knowledge base written together by the team.
Tables	Lightweight databases for lists and records, without programming.
Forms	Create forms and surveys and collect the answers.
Polls	Polls to set dates and decide as a team.
Notes	Personal notes, always at hand.
Calendar, contacts and email	Calendar, contacts and email in the same place.
Teams	Groups of people created by users themselves, for easy sharing.
Comments on files	Comment on documents and mention colleagues.
Activity and notifications	Follow what changes and get notifications.
Related resources	Links between related files, chats and tasks, and quick insertion of content.
AI assistant	Summaries, translations and other AI tasks, inside the system.

09 Sharing

Share with whoever needs it, inside and outside the organisation, under control.

FEATURE	DESCRIPTION
Public links	With a password, an expiry date and view-only mode.
File drop	Upload-only links, without seeing the folder's contents.
Federated sharing	Sharing between different servers, for example with partners.
Guest accounts	Limited access for people outside the organisation.