



# e-grou DOCUMENT MANAGEMENT

## Control document organization and access

Do you feel a need for improving document organization, eliminating the time wasted in search and recovery of lost documents, and for bringing under control document change and approval processes?

e-grou is a document management solution that gives you the flexibility to organize documents the way that best fits your company's needs, that offers effective search mechanisms to quickly locate your documents, and provides a flexible and efficient security model.

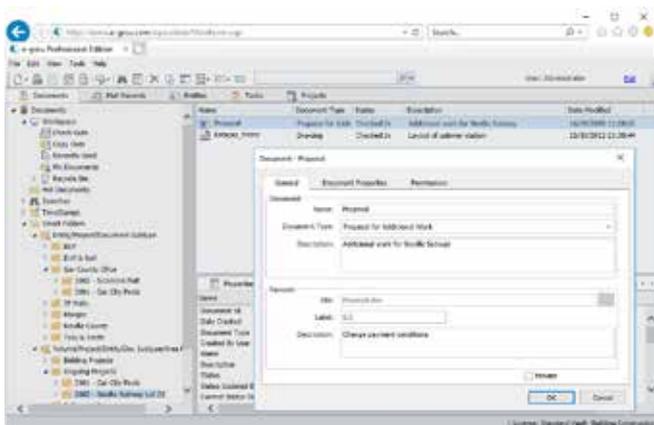
e-grou offers a large number of ready-to-use features, completely out-of-the-box, making it easy to fit your company's needs and to implement it in a short time, granting a quick return of your investment.

## Organize documents the way you work

Inside e-grou, documents are displayed in hierarchical trees of folders, much like as in *Windows Explorer*. However, each folder in this tree is a smart folder that is associated with a criterion for visual organization of your documents.

Once a document is imported into the vault, the document is organized automatically under the smart folder view trees that have been created in the vault. In case the folders that should display the document do not exist at the time the document is imported, e-grou will create them automatically according to the smart folder criteria defined.

You may get to the same document navigating through different smart folder trees without needing to have multiple copies of the same file.



## Find the documents you need faster than ever

Smart folders provide your company with the means for effective and flexible organization of your documents. In addition to smart folders, e-grou provides you with powerful search mechanisms to quickly locate the documents you need.

You may define searches using document attributes, keywords, and document content. The result of these searches is kept in folders and the searches may be stored for later reuse.

## Configure e-grou to suit your Company's needs

e-grou offers many configuration options that ease meeting your company's specifications and to a certain degree to fit each user's preferences, without further programming. You may specify:

- The attributes that you will use to organize and locate documents. You may create document and revision level attributes.
- Private and public searches.
- Document types. In e-grou document types are characterized by an approval mechanism, attributes, access permissions and life cycle management rules.
- The criteria to be used to organize documents in smart folders.
- Templates to create new documents, per document type. *MS Office* templates are integrated with e-grou's database data.
- Templates to automatically import documents, entities, and mail records according to a predefined calendar.

## Control access to documents

In e-grou you can specify which user groups may access each document type and assign them a specific access level: view card data, view content, change, create, delete, approve, etc.

In the operating system you define access rights, assign them to user groups and apply them to folders regardless of the type of documents contained in the folder. e-grou allows you to define access rights per document type.

In e-grou, user group access rights are defined per document type. When a new document is added to e-grou, by default, the access rights are assigned according to the document type that you selected for the document.

e-grou writes to a log all actions that users perform on documents: visualization, change, deletion, printing, etc., building a comprehensive audit history of all user's interactions with the system.

## Control document's life cycle

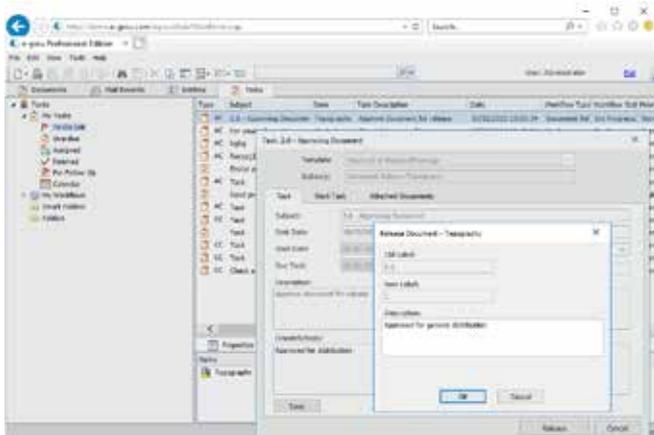
With e-grou you can control the overall document life cycle, from the moment the document is created until it is moved offline.

All changes made to the content of a document and to its classification attributes are recorded. You may know who changed a specific version, why it was changed and the date it was changed. You may know who approved a revision, the date of release, and the participants in the workflow process. e-grou gives you a complete audit trail of a document life cycle.

After a document is moved offline you may still view the document's card information, attributes, revisions, release processes, related documents, etc. and reclaim the document.

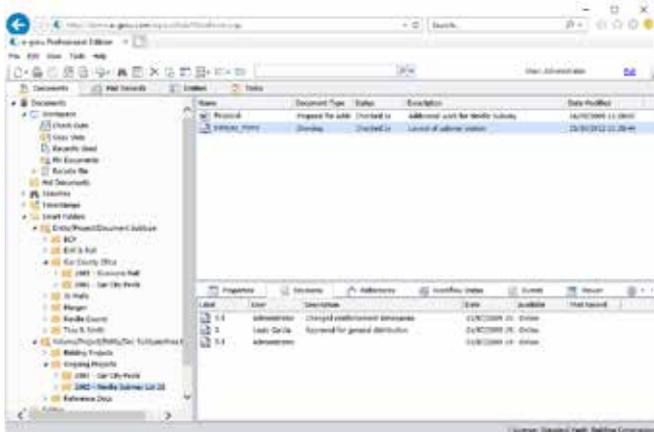


# e-grou DOCUMENT MANAGEMENT



## Avoid errors using the right version

e-grou offers control mechanisms to avoid that you may inadvertently use the “wrong” version or an outdated copy of a document.



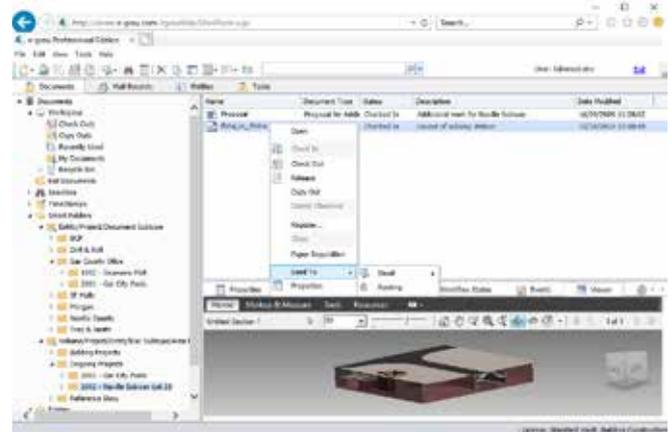
To change a document you must first check-it-out. The last version of the document is copied-out to your local workspace and other users are blocked from changing it. They still can visualize former versions of the document.

After you are done, you can check-in the new version. This version is now available to other users for editing and visualization. When a document that is being checked-out references other documents, e-grou copies them to your workspace, as well. e-grou can keep you posted of any updates done to the documents that you copied-out to your workspace.

## Notifications help to keep you posted

Users may be notified of all new tasks assigned to them in the course of ongoing document routing and release workflows. Notifications may be at the OS level or sent by email.

Users may request to be notified of any document changes and releases occurred, as long as they have the appropriate access rights. If you copied a document to your local workspace, e-grou may notify you, upon your request, of any changes made to the original document.



## Benefit from the integration with MS Office and Autodesk

You may access the most relevant e-grou document management functionalities from within *MS Office* applications and the *Autodesk* suite of products (AutoCAD, Inventor and Revit).

The e-grou add-in adds an e-grou menu to the toolbar of the most popular *MS Office* applications and to the *Autodesk* suite of products to allow users to check-in, check-out, release, copy-out and release documents, from within these applications.

*MS Office* documents created from e-grou templates may be automatically filled out based on document attribute information.

The e-grou connector with *AutoCAD*, *Inventor* and *Revit* manages check-in and check-out of Xref files in an automatic manner.

You may resort to e-grou’s API to integrate with other software solutions, such as *CRM* and *ERP* systems.