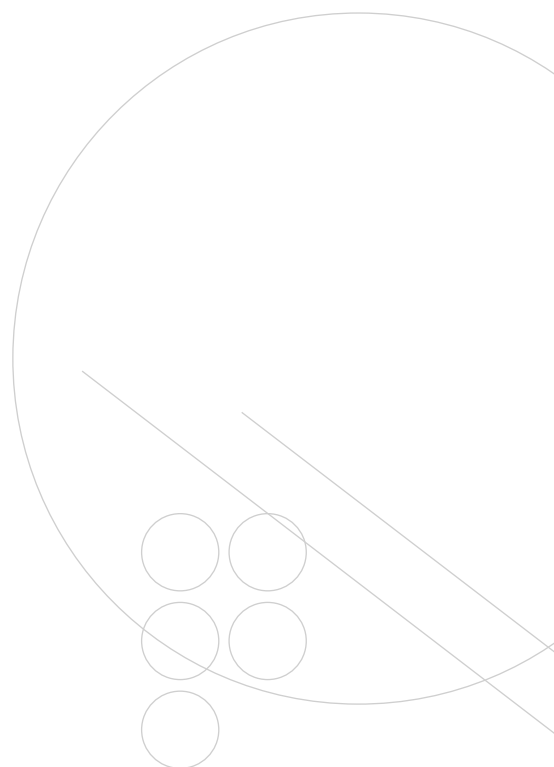


Basics of Electronic Document Management



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1. Introduction

Did you know?

Every tree provides oxygen enough for **3 people** to breathe (North Carolina Office of Waste Reduction and Recycling)

Organizations print, copy & fax more than a **trillion** pages each year (Infotrends)

42% of users have achieved a payback period of 12 months or less from their scanning and capture investments. (AllM report "The Paper Free Office - dream or reality?")

Electronic-only filing would halve the storage space needed for paper in **5 years** (AllM report "The Paper Free Office - dream or reality?")

Over the last few years, organizations across the world have acknowledged the need to manage business information and processes more efficiently and cost-effectively. As **documents are the lifeblood of any organization**, it's important to look for better ways to manage them. Thankfully, technology has made it possible to replace paper based document management systems with more effective, electronic ones. This has **3 key benefits for businesses**:



1. Financial Benefits

In terms of cost savings. This is primarily due to lower consumption in office supplies and saving on storage space.



2. Efficiency Gains

Through better ways to organize, retrieve and manage documents; and by automation of business processes.



3. Environmental Benefits

By reduced paper consumption, which would eventually lead to better preservation of the earth's forest cover. Reducing your organization's carbon footprint is one good way of fulfilling your corporate social responsibility.

This eBook is a primer on the subject of managing documents electronically. Here's a brief description of what we cover:

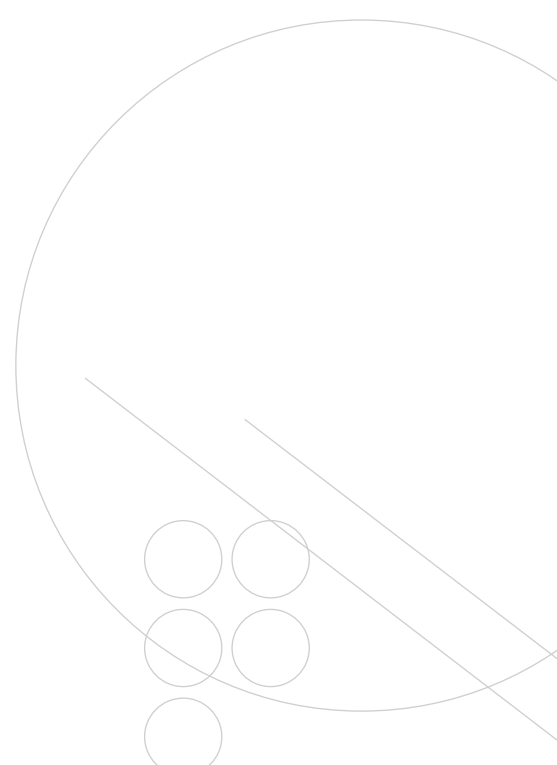
- We start off by defining what a document is.
- Then we move on to discuss the **quantitative and qualitative gains** that document management software offers, under the section *Measuring ROI on a Document Management System*.



- Once you are clear about this, you need to **assess your organization's readiness** for adopting electronic document management. The next section guides you how.
- If your organization is ready, you need to start *Preparing for a Document Management System* - we delve into the three steps you need to take as part of this.
- Lastly, *Planning How to Organize Files in a Document Management System* discusses the importance of **studying the specific needs of the department** where electronic document management is first being rolled out; and then how you will **go about organizing files** in the document management software you have just acquired or decided to acquire.

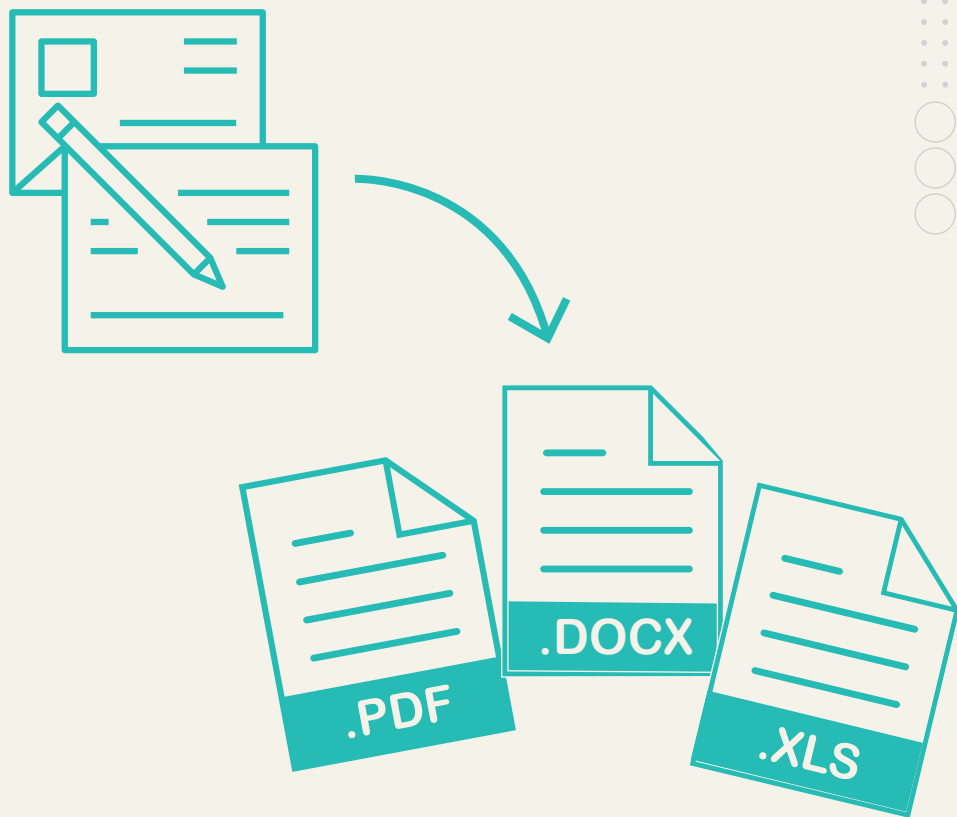
By the time you have completed reading this eBook...

You will have gained a **solid foundation** in terms of what electronic document management is and how your organization can gain if you **adopt it sooner rather than later**.





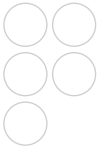
2. Everything is a Document!



Whether or not your organization has a document management system in place, it helps to know what constitutes a 'document'. Here we do some ground-work for you by defining and explaining what a document is. This is a starting point for all discussions on document management. **Once** a document is **clearly defined**, it becomes **easier for you to set expectations** from your document management system.



A Small Exercise:



Read this word: Document

What was the first mental picture or thought you got after reading that word? Quite likely, you got the picture of a paper or an MS Office document, especially a Word file. Yet, everything is a document! This executive brief aims to present 'document' in its true light: to present it as it really is - not what we perceive it to be. If you are reading this 'document', chances are you create, view, edit or interact with documents everyday in one way or another. So it helps to look at how others define 'document':

Wikipedia defines 'document' as, "A document (noun) is a bounded physical or digital representation of a body of information designed with the capacity (and usually intent) to communicate. A document may manifest symbolic, diagrammatic or sensory- representational information." (<http://en.wikipedia.org/wiki/Document>)

The UNESCO web site defines 'document' as, "The combination of a medium and the information recorded on or in it which may be used as evidence or for consultation. Examples include: a sheet of paper with writing; an e-mail message; a film with images..." (www.unesco.org/webworld/mdm/administ/en/guide/guide011.htm)



► What does a document do for you?

When we think of documents, we assume it's either paper or digital. But we forget to see that **any information-carrying item** that communicates anything **of value is a document**. We tend to look at just the file format or the medium. So "if it's paper or .doc, it must be a document. If it's a tape or film, it's not a document, but an object." But **there's another way to look at it: What does the document do?** Your PowerPoint presentation or a demo video hosted on the Internet may not be a document for the average surfer; but to your organization, it is an important tool in reaching out to its potential customers. That's because of what it does for you. So in a sense, everything is a document

That brings us to a very important question in this discussion...

► I work with documents all the time, but how do I manage them?

If you are the typical office employee or even a business owner or decision maker, you would be handling dozens and possibly hundreds of information-carrying materials (or documents) every day. To manage so many documents efficiently, you need a system that will help you create, classify, organize, store and process documents such as contracts, invoices, letters, emails, forms etc. You need a document management system.

► Managing information digitally

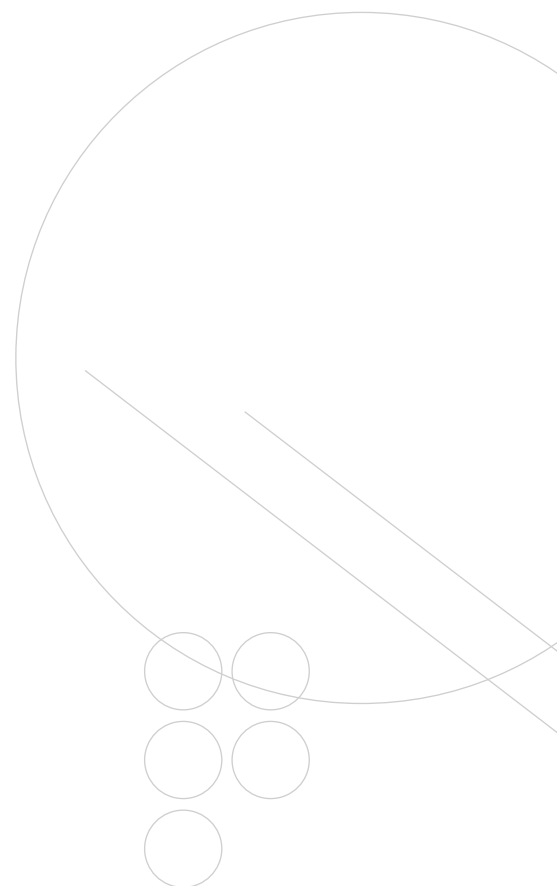
Business today is getting more and more competitive. With resource constraints, organizations sometimes lack the capacity to invest massive resources into promotional and other activities. A good way to compensate for this and increase your competitiveness is to utilize your existing resources more effectively. This can be achieved by cutting costs, outsourcing non-core functions etc. Still, you will need to manage and utilize the sea of information at your disposal and keep your communication lines clear. This can be best done using Electronic Document Management Software (EDMS).

Document management software helps you convert paper documents into



digital formats, store both your paper documents as well as electronic documents in a centralized location. This translates into huge cost savings in terms of consumables. The software helps you create, store, edit and share documents and do much more with them. For example, you can link documents to one another - this helps you switch between the linked documents in just one click and save time. You can highlight text within a document, stamp the document and sign it. In fact, GLOBODOX enterprise document management software can be configured to monitor pre-specified folders so that as soon as a new document is added to a folder it becomes visible in GLOBODOX!

Using document management software has helped countless businesses across the globe gain complete control over all their documents and helped improve their operational efficiency. This has made them more competitive. You too can benefit from this technology and further improve the way you manage your business. Visit the GLOBODOX web site to learn more about document management software and how it can work to your advantage.



3. Measuring ROI on a Document Management System



Every business that is run for profit wants to and more importantly needs to recover the money invested in it. Only then does it make the business of any value in financial terms. This means you should aim for every investment in your business to yield a positive Return on Investment (ROI).

Whether you want to expand your operations to a larger building, whether you are looking for a scanner for your department or maybe you want to introduce a document management system (DMS) in your firm, your business needs to consider what the Return on Investment will be. Here we discuss the quantitative and qualitative benefits offered by electronic document management systems to any organization that chooses to invest in one.

► "Should my company invest in a document management system?"

Before you decide whether or not to invest in a DMS, it is important that you consider:

1. Calculating your return on investment based on the various cost components and the monetary savings/gains to be made
2. Weighing the non-financial benefits of having a document management system against the cost you would incur.

► Some questions to ask yourself to help you calculate the ROI...

1. How many people does my office employ to manage documents and what do they get paid per hour?
2. How many documents need to be retrieved and how many copies of documents are created every day?
3. What are the costs of office supplies (stationery etc.) every month?
4. What is the monthly cost incurred on storing documents?

There are, of course, many other points you may need to consider to get the numbers right depending on the size and complexity of your business. Let us take a very basic example, where your company hires 10 people whose primary job is handling documents and who get paid at \$15 an hour. If each employee spends 1 hour on average searching a paper based document, retrieving it, making copies of it and filing it again; you end up incurring \$150 every day simply on managing documents! In a month of 22 business days, that's \$3,300 - or \$39,600 a year; not a petty amount by any means - even for a large organization.

Now say you invested in multi user document management software costing \$5,000 for a 10 user license pack. You also purchase a scanner for \$1000. Your total investment will be \$6,000. Your employees will have all their documents stored in the document management system's database and accessible from the DMS, so it will only take them a few seconds to pull up the files they need and possibly a

few minutes to scan any documents, which equates to a much more productive working day. Numerically speaking, with your 10 employees spending hardly 15 minutes each day managing documents, the per employee cost at \$15 an hour will be just \$3.75; and your total daily cost will only be \$37.50! That means you would spend \$825 a month - just \$9,900 a year managing documents. Add to it the \$6,000 you invested in the DMS with a scanner, and your total cost is only \$15,900. How much do you save? That's right: \$39,600 less \$13,400 = \$23,700 in the first year itself!

Even if you tone down the savings to make the case for a DMS less one-sided, you cannot ignore them - they are just so huge.

► Now let's look at the non-financial benefits...

In addition to the monetary savings that can be made, a document management system delivers many more business benefits.



1. Save time

Offices run on information, so if the data you have at your disposal is not organized systematically, your time is wasted. When you manage your files electronically, you can organize them by folders, tags and document types, depending on the software you use. A typical solution would have quick and advanced search features to help you locate files faster.



2. Improve efficiency

Multiple users can access the document management software simultaneously, resulting in improved communication and work getting done faster. If the DMS has built-in scanning software, you can easily convert paper

documents into digital files and even email them to your clients, thereby portraying you as an efficient firm to do business with.



3. Remote access possible

Some document management systems allow you to remotely access your important electronic files, ensuring that even if you are outside your office, you can carry on working. This means you can complete your work faster, resulting in higher productivity and lower turn-around times (TAT).



4. Disaster recovery

Desktop applications usually allow you to back up your documents to a secondary location which could be another computer on your network or even an online location; so you don't lose your data in case of any disaster. You can also quickly retrieve all the backed up documents, thereby maintaining business continuity.



5. Compliance

Some types of organizations are required by law to manage records in such a way that these are transparent and readily available to certain agencies and the public. Document management systems help such firms organize and manage their information to meet these standards. For example: a) The Sarbanes-Oxley Act in the financial industry, and b) The HIPAA in the medical field.

6. Eco-friendly

Electronic DMS either completely or drastically reduces your business' dependence on paper. This in turn helps



save the environment in two ways. Firstly, it saves trees; and secondly, if adopted widely, it reduces the demand for paper. Paper manufacture causes a lot of air pollution. So the next time you scan a paper document or decide not to print an email, you can be sure that you are playing your part in making your surroundings healthier.

These are just some of the non-financial gains of investing in an electronic DMS solution. Generally speaking, the wider the implementation of a DMS across an organization, the greater the ROI. This is true especially of desktop DMS solutions like GLOBODOX, as investing in larger multi user license packs tends to lower the per user license cost to the organization. **Measuring ROI** on a document management system is **important, so long as it does not delay** the process of **rolling out the DMS**. The sooner you implement a DMS in your organization, the quicker you can recover your investment in it.

3. Is Your Organization Ready for Document Management?



Before introducing an electronic document management system (EDMS) to your business it is important to understand how you want to manage your documents and what the ROI would be by investing in an electronic document management system. Quite simply put, is it worth investing in an EDMS or is it better to carry on with the way documents are currently managed?

Once you discover that an electronic document management system can translate into monetary and other business benefits, you need to decide if your organization is ready for document management. This is important as every organization is at different stages of growth. If you do not have adequate document volumes, or the staff to justify the investment then it may not be the right time to introduce an electronic document management system.

In this section of the eBook, we help you find out if your organization is ready for an electronic document management system (EDMS). An EDMS helps define and manage business processes more effectively, proving to be an asset to the firm.

Consider these factors...

Below are some factors that will help you decide whether your organization is ready to look for a document management system:

► Volume of documents handled

No matter what the size of your business is or how many people you employ, most businesses generate dozens - if not hundreds - of documents a day. Most documents exchange hands or are emailed several times, often with many revisions. This can lead to the managing of documents becoming a project itself. If you find your organization or department facing a similar challenge, then the time is ripe for you to look for a document management solution.

Without an EDMS, your staff may sometimes feel overwhelmed but with good document management software in place, they will always be in control of the documents they have generated and need to work on.

► Paper based documents or Electronic documents?

The Natural Resources Defense Council (NRDC) web site states that, "A typical office disposes of about 350 pounds of wastepaper per employee per year. Identifying ways to reduce paper use can save money." The NRDC figure is an average: your company may be generating far less - or far more - paper based documents every year. If you have not yet converted your paper-based documents to an electronic format, then consider making it a priority. There are 3 main reasons to do this:

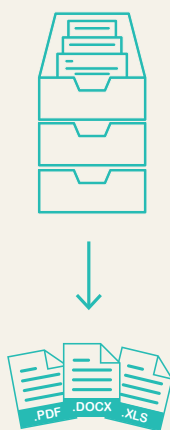


1. Compliance

The law sometimes stipulates that you keep your business records well-organized so that when needed for the purpose of review, the required data is readily available. E.g. The Sarbanes-Oxley Act (SOX), which was passed with the purpose of building and restoring public confidence in

the financial reports of American corporations. If documents in your firm are managed electronically, their mobility and longevity increases tremendously. This comes as a big help during reviews and checks carried out by government agencies, as all your data would be in place.

2. Storage space



Businesses that survive in the long run tend to maintain a paper archive of documents. As office space comes at a premium, it may not always be feasible to keep your document archive in-house. You might have to store the documents at an offsite location, which again costs money. You may save money by outsourcing document storage, but it is only a temporary solution. The only lasting solution is to digitize your documents by scanning them and saving them in PDF, TIFF and other file formats and using OCR to make their content searchable. A document management system makes this possible and at the same time does away with the need to rent space to store paper based documents. Documents that are no longer required can be destroyed using safe, legal procedures.

3. Cost savings



As a primary medium for storing information, paper proves to be quite expensive since it is a recurring expense. Add to it related costs like files, other supplies, filing cabinets etc. and your costs go up even more. Switching to electronic document management may cost you some money initially, but it works out to be an economical alternative in the long run - and most, if not all, businesses plan to survive in the long run!

► Business continuity

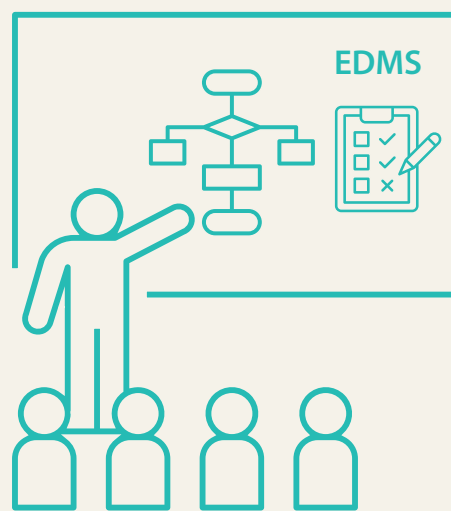
If you have stored your paper based document archive offsite at a distant but low-rent location, it does save you money in the short term. But in the event of a natural disaster like a flood or tornado, if your entire paper archive is destroyed, you may have nothing to fall back on. If you have invested in an EDMS, that will become your main document database and your paper archive will only serve as a secondary backup - that too only if you really need it (your primary backup should be online through an online backup service). Even if the natural event extends to your office and your machines are destroyed, if you have backed up your document database online, your document management system can be up and running again within hours of getting your IT setup back in place. If you see the clear advantage of trusting an electronic document management system with your document database, then you are ready to proceed to the next step.

► Buy-in from stakeholders

IT Managers face the challenge of evaluating the need and readiness of their organization to adopt EDMS on the one hand; while on the other, they have to convince the various stakeholders of this need. The CEO may be ready to give the formal assent, but the finance department may have their own calculations to do. Sometimes, it is also important to get the opinion of the employees who are actually going to use the software. They need to be taken into confidence. So if you have not yet got a buy-in from all the parties involved, you should wait before proceeding to shop for a document management solution. However, if you have taken the necessary permissions and inputs from them, then it's time you began evaluating a document management system.

Based on the factors we discussed above, if you are convinced about the readiness of your organization to adopt an EDMS, you should start preparing to roll it out in a phased manner. It may take some time for your firm to convert your paper archive into digital files. But if you use a solution like GLOBODOX enterprise document management software, it will be well worth the investment, both in financial terms, as well as in terms of operational efficiency.

4. Preparing for a Document Management System



In the Introduction to this eBook, we said an Infotrends study reveals that **businesses print, copy and fax more than 1 trillion documents every year**. That's **1,000 billion documents every year!** Your firm may not work with something anywhere close to that number; but if the number of documents your firm handles poses a challenge, then it's big enough to justify getting an electronic document management system (EDMS). In that case, you'd better start preparing to put one in place, as the sooner you begin using a document management system, the sooner you can start making the transition and reaping its benefits.

This section focuses on the preparations you need to make before your employees start using an EDMS as part of their daily work routine.

The **preparatory stage is the most crucial stage** in implementing an electronic document management system. You already know that you need an EDMS and you also know the kind of returns you can expect and in what timeframe. But in order that your organization does derive the benefits it is looking for, you need to make the right decisions as regards the type of EDMS to choose, the extent of implementation in the initial phase, who will evaluate the options available etc. Let us look at what exactly preparing for an EDMS entails:

► Identify department or process

To ensure successful deployment of an EDMS, we recommend adopting the following approach:

1. Roll the software out in a phased manner to ensure business continuity
2. Start with a process where the need to go paperless is urgent
3. Let the staff practice using the software so that eventually they will be able to speedily complete their tasks with the help of the software
4. Evaluate the software's performance as to how it has helped the staff work more productively and efficiently, before you extend it to other processes.

Identifying relevant EDMS features needed by each department

There are a number of document management features that every individual or department will use. Common features include: quick and advanced searches, scanning and indexing features, ability to work with folders and tags (labels), import existing folder structures, export documents to external media etc. Yet not all departments need advanced features.

Modern document management systems offer advanced security features like document-level access control, hierarchical security groups, audit trail etc. Some suites also offer features that allow documents to be saved as drafts under review, so that only those users who are authorized to modify them can access them while they are under review. This is a useful feature when working in a team structure; e.g. a copy editor reviewing the work submitted by their team of copywriters.

A feature like workflow may not be required by all departments. This feature, although quite popular, is best suited to processes that are built around specific tasks performed on a document by the users. E.g. in the case of mortgage loan processing, where a client's file keeps heading towards the closing table as the documents in it move through the workflow pipeline. Now if you work in the above scenario with a team of copywriters, you should look out for document management software with the drafts feature rather than a system that offers workflow. **Such decisions need to be made at the preparatory stage** of implementing a document management system.

► Evaluating the software solutions

Once the extent of initial implementation and the features required have been determined, it's time to evaluate the different EDMS products out there. Before evaluating the features and performance of the software, you need to **determine your budget for the initial phase** and for subsequent phases too. Your shortlist of EDMS products will consist of those which fall within your budget or do not exceed your budget by much.

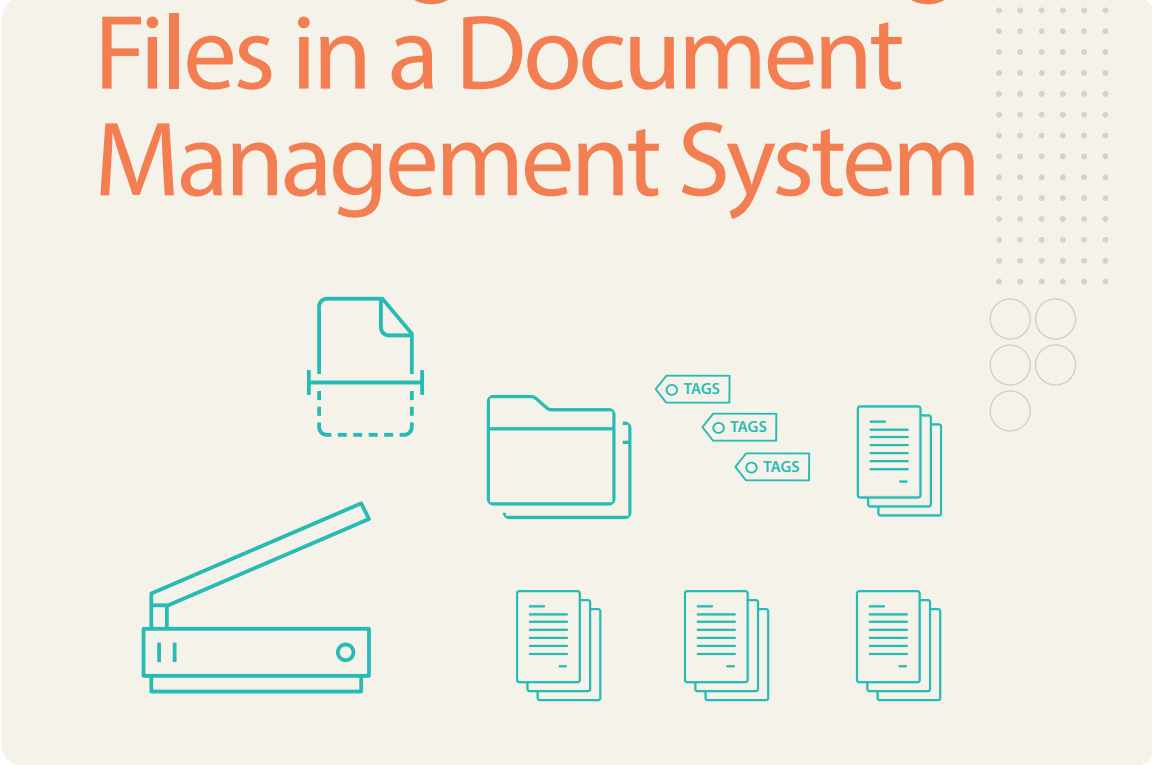
For evaluating the software, choose a small team of evaluators that comprises one of your IT Managers as well as a mid-level Manager of the process for which you are getting the software. This will take care of the technical aspects as well as ensure that the software can 'fit-in' with the unique requirements of that process. Apart from the features and performance, **an important point to consider is ease of use**. Does the software have a simple interface? Can the average user be trained in a few hours and get started with the basics without needing much supervision? A solution like GLOBODOX obviously scores here as its MS Outlook-type interface is familiar to most people.

The preparatory stage is crucial because this is where you determine how many resources you want to commit in terms of money, manpower and records. If you introduce electronic document management in a phased manner, then even if you find that your expectations from the system were less or more, you can always go back to the drawing board, re-work your needs and extend the document management system smoothly to the rest of your organization.

It is advisable to conduct a periodic review even after the document management system has been extended to the rest of your organization. This is needed as businesses operate in a dynamic environment and therefore the requirements of each department could change over a period of time. GLOBODOX enterprise document management software is designed to be scalable and can adapt to the changing needs of your business.



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Once an organization has decided to introduce an electronic document management system (EDMS), they then need to go through two key planning processes: firstly EDMS selection and secondly, the implementation process. We begin this section with a quick look at the first process. We then discuss **why it is important to plan before** you start organizing your documents and **how to go about** organizing them.



► Quick recap of EDMS selection process

In the earlier section we saw that process of EDMS selection requires a business to:

- Identify the department or process where it is needed most.
- Compile a list of features required from an EDMS that will help your staff perform their tasks most efficiently
- Look for solutions that meet the criteria set by you while being within your budget
- Evaluate the solutions available and decide which one best meets your requirements

Once a selection has been made it is then just as important to plan for the implementation of that system and decide on how you want to organize your documents so that looking for them when you need them does not become a job in itself. This essential preparation before introducing your electronic document management system will ensure that your business...

- i. Reduces the amount of paper it uses
- ii. Enables your organization to quickly and easily find documents
- iii. Work on those documents with ease and thereby help meet your department's goals.

► Planning How to Organize Documents

When we buy any new product, it is a natural instinct to start trying out its features. The same is often the case when you invest in document management software. The difference though, is that in this case, working with documents is your daily job and thus you would have an archive full of documents to try out! So before you make an attempt to organize your document repository, take some time out to plan how you will do it. Planning how you will organize can actually make a world of difference in terms of the value that you will derive from your newly acquired software. Let us see why planning is so important and how you can go about it...

► Planning is different from Organizing

If you buy a new filing cabinet with a different design and start arranging all your files in it just like you arranged in the old one, what would be the result? You could end up arranging them in a way that makes them hard to retrieve by your colleagues. Why? The reason is that no thought went into organizing them in a user-friendly way. In this case planning would be the thought that goes into organizing files and organizing would be carrying out of the plan so that it meets your objectives. Planning before organizing lays a sure foundation on which you can build an efficient way of working.

► Scanning old documents or new

Taking the example of filing cabinets further, if you have been in business for many years, chances are your document archive is huge; possibly comprising a room full of filing cabinets. Trying to scan the entire archive as soon as you get the software is not advisable. It would be better to start off with paper based documents that you have created recently; e.g. recent legal documentation, documents bearing physical signature etc. Meanwhile, find out which of the older documents are accessed most often so that you can scan those in a separate batch. This will ensure that your system is utilized to meet your current document management needs as well as bring your archives up-to-date.

► Organize documents in search-friendly ways

A good document management system has several features that help you organize them in a way that you can find them in just a few clicks - sometimes in just one click! For example, a solution like GLOBODOX has the document linking feature which allows you to link a document to one or more other documents so that if you need to refer to another document, you can jump to it in just a single click - the quickest search you could imagine! Also, if you have captured a document's indexing information like its Document Type, Creation Date, and Author etc.; you can use these indexing fields as advanced search criteria and locate that document quickly.

► Plan how you will use folders and tags

A major advantage of electronic document management software is that unlike paper based documents, you don't have to re-file the documents after referring to them. But in order that you can get to those documents you have scanned and added to the software, you must have a tagging system in place. It is easy to tag a new document that was never in paper form. But when you have scanned thousands of documents, you need to plan how you will organize them into folders and sub folders and what tags you will assign to each document. Employees across organizations spend several minutes every day simply looking for documents. Therefore, a well-planned folder structure and tagging guidelines can greatly speed up the retrieval of documents.

► Organizing by projects and workflows

If your staff works on project-based teams or you have designed workflows for your teams, then you could find yourself using features like Stack Types, Workflow Designer and Workflow Monitor that are typically found in enterprise document management software like GLOBODOX. In such a scenario, you need to plan out how you will organize the digital versions of documents to make them part of the workflow. This aspect of planning could take more time but is worth it, because it relates to actual tasks being performed on documents by your staff as also by the software.

► Plan to organize documents in a backup-friendly way

You can back up your documents online as well as offline. However, if the folder structure, reports and other details have changed since the time you last backed up your documents, in case of a disaster, your staff may find it difficult to continue working from where they left off. So it is important to plan out how you will organize your documents so that business continuity is maintained.

Once you have planned in detail how you will go about organizing documents in the electronic document management system, you need to ensure that this plan itself is documented. It will serve as a handy model when you extend EDMS to other departments or teams in your organization.

7. The Next Step...

The document management process broadly consists of 5 stages...

1. Capture



This includes scanning of paper based documents and importing digital files like MS Word, PDF, JPG etc. and saving all these files to the document management database.

2. Secure



As soon as a document enters the database, it must be secured to prevent unauthorized access. This can be done using document level access control, hierarchical security groups (access based on workgroups) etc.

3. Manage



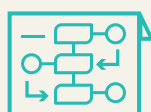
This includes organizing documents in search friendly ways, retrieving them, modifying them etc.

4. Collaborate



Documents often need to be reviewed by multiple users before they are approved. Collaboration enables you to securely share documents, check them out for editing, check-in drafts and publish documents once they are approved.

5. Automate



Organizations can go truly paperless only when paper based processes are replaced by their digital equivalents. Good enterprise DMS solutions offer the ability to route documents automatically for the completion of process related tasks. This is done using digital workflows.

The **next step** for you is to **look for an EDMS that covers all the stages** of electronic document management outlined above. **GLOBODOX** is an enterprise solution that **meets that criterion**. It is available as a Suite and also as a Standard solution with optional add-on Modules. Organizations the world over have trusted GLOBODOX to help manage their documents and automate their processes. You too can experience similar benefits. **Contact us now** to learn more.

“ We have been using GLOBODOX for almost a year now and it suits our needs perfectly. We shopped around and compared a dozen solutions but couldn't find any features that made paying two or three times the GLOBODOX cost seem worth it. We called 10 companies using GLOBODOX and discussed their experiences with the software and everyone had good things to say.

A few times we have had questions about configuration or upgrades and needed to reach out to support, they have responded quickly (within a few hours) and they have been great at diagnosing and solving the issues.

If you are searching for a document management solution but can't figure out why some of those solutions cost as much as they do, GLOBODOX may be exactly what you are looking for. It has been for us. ”



Jon King,
Employment Enterprises Inc, USA

About GLOBODOX



GLOBODOX is an enterprise document management software which can securely manage documents and automate document approval processes.

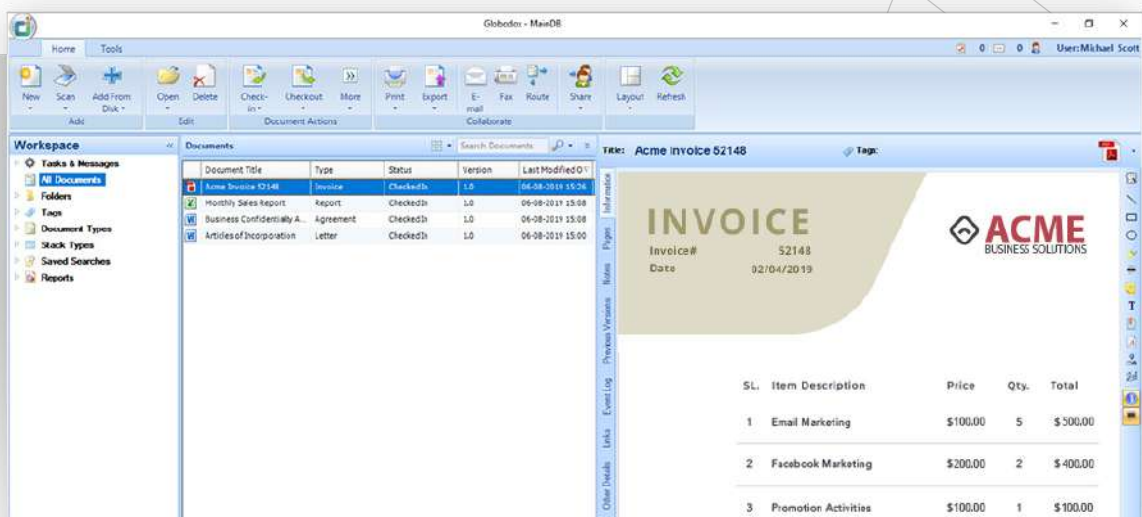
Leading enterprises from across the world use GLOBODOX as their standalone document management system to streamline, automate, and expedite document-centric business processes and to gain efficiency, security, and transparency.

GLOBODOX is used by industries such as Accounting, Legal, Manufacturing, Government, Education, Insurance, Banking, Construction and Healthcare

You can try GLOBODOX for free to see how it works

<https://www.globodox.com/download/>

Over
60
countries
trust us to meet
their Document
Management needs



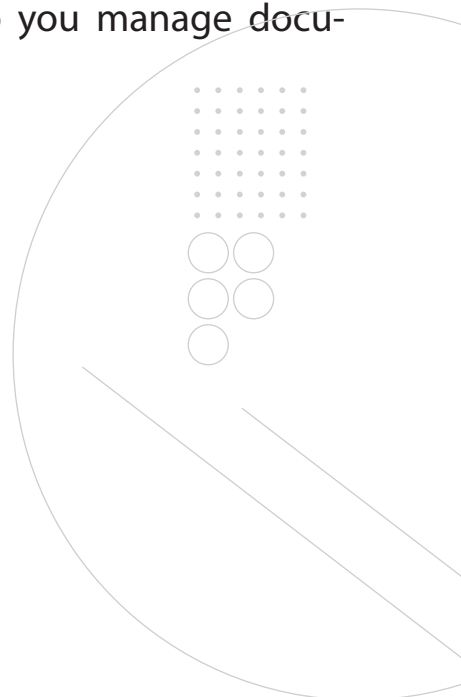
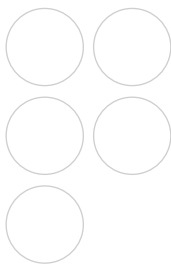


About ITAZ Technologies



ITAZ Technologies is a leading innovator in the field of document management and business automation. As pioneers in the document management software segment, we build highly intelligent document management solutions, empowering both businesses and government organizations from over 60 countries across the world to go paperless and rapidly achieve end-to-end business process digitization, making their operations more streamlined, connected, efficient, and compliant.

Contact us to know how GLOBODOX can help you manage documents and processes digitally!



GLOBODOX Features



Add unlimited documents and folders

Add documents in bulk or an entire folder with a single click.



Scan paper documents

Scan and add multiple single-page or multi-page documents using your scanner.



Built-in OCR

Automate the indexing of scanned paper documents with built-in OCR for easy organization and searchability.



Zone maps

Define zone maps on documents to parse indexing information from paper documents while scanning.



Built-in viewer for popular file formats

View .pdf, .doc, .docx, .xls, .xlsx, .dwg and many other file formats using the in-built viewer.



Search in documents

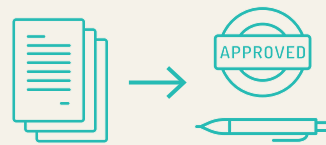
See where a search term occurs within a document.

Globodox Features



Multi-layered access

Limit users' ability to view and share documents based on their individual roles.



One-click routing

Route documents for signing and approval using Workflows with a single click.



Integrate using REST API

Integrate document management functions of GLOBODOX with your business applications through the REST API.



Ensure compliance

Make compliance with HIPAA, SOX, GDPR etc. easier with GLOBODOX's security, encryption, and audit trail features.

See complete list of features over here...
<https://www.globodox.com/globodox-features/>



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