DRIVVE | DM

Whitepaper

Agenda

In this whitepaper for our Drivve | DM document management solution you will find information regarding functions and benefits as well as technology and specifications. We have also included information regarding security and failure protection features of the Drivve | DM Cloud solution. If you have questions concerning a certain project or our solution in general, please don't hesitate to contact our team of document experts.

Benefits

Drivve | DM is an award-winning, browser-based document management system that delivers comprehensive functionality and certified security through an intuitive user interface. Drivve | DM helps organizations run more efficiently by providing a user-friendly solution that enables full control of document processes.

Reduced Costs

- Minimize physical document storage costs
- Reduce document shipping costs
- Avoid late fees and penalties
- Intuitive user-interface reduces training and support costs
- Use Drivve | DM Cloud to eliminate infrastructure costs

Enhanced Productivity

- Quickly access desired documents
- Easily automate manual business processes
- Improve collaboration with powerful document workflow tools
- Streamline essential business processes in areas like accounting, order processing, and human resources

Heightened Security & Compliance

- Comprehensive, multi-layered security & user management
- Maintains a full, system-wide audit trail of every event
- Control access to confidential information
- Full compliance with EU General Data Protection Regulation (GDPR)
- Supports regulatory and management frameworks such as SarbOx

Greater Business Efficiency

- Improve customer response time by ensuring instant access to requested information
- Optimized administration and organization of documents
- Rapid processing of inbound documents and correspondence
- Find documents significantly faster

Improved Collaboration

- Instant access to documents in the office or on the go
- Share information & workflows with the whole team
- Share documents online using Drivve | DM
- Drivve | DM Mobile App for Android and Apple iOS devices
- Guest licenses for project work and audits

Increased Ease-of-Use

- Attractive, easy-to-use interface
- User-friendly, centrally administered installation & configuration
- Intuitive filing structure and file administration tools
- Seamless integration with Microsoft Office applications
- Complete solution with database

Functions

Document Management

- Securely manage documents from capture to archiving and deletion
- Organize documents in flexible and intuitive filing structures
- Establish full version control and check-in/check-out parameters
- Easily associate archived documents to relevant file folders, projects, and workflows

Space Management

- Create focused work "Spaces" on specific subject matter (e.g. projects, teams, customers, products, etc.) for aggregating and managing relevant documents from across filing categories
- Create contextual links by associating documents to multiple Spaces
- Establish and manage processes & workflows within and across Spaces

Document Capture

- Easily migrate documents located on file servers
- Scan documents using Drivve | Image directly to your archive
- Add documents directly from Microsoft Office applications
- Upload documents through the Drivve | DM browser interface
- Comprehensive bulk import capabilities

Search & Retrieval

- Search engine supports full-text & contextual search
- Combine terms from several input fields into one search
- Save favorite searches
- Create different views of your documents
- Focus document search on specific Spaces

Workflow

- Easily create and publish workflow templates
- Automate workflow distribution
- Create ad hoc workflows & easily modify existing workflows
- Search and monitor existing workflows
- Share documents internally & externally

Bookkeeper

- Administer accounts, cost centers, and projects
- Easily create split postings
- Manage, allocate and assign receipts
- Export bookkeeping records for further processing
- Secure bookkeeping processes with dedicated permissions

Specifications

Drivve | DM offers you the perfect combination of exceptional user-friendliness, an extremely powerful database, a variety of efficient functions and certified high-level security standards. These characteristics are the ideal basis to gain and increase productivity and quality in your company, to reduce costs and to sustainably ensure your investment in the system.

In order to help you decide whether Drivve | DM is the perfect document management for you, we put together all functions and characteristics of Drivve | DM in the following overview:

Document Capture

- Easy import of documents stored on your server
- Monitoring of email inboxes
- Document scanning through Drivve | Image straight into the archive
- Assign a document to any personal Drivve | DM inbox while capturing
- Smooth integration in your Microsoft Office applications
- Document archiving directly through the Drivve | DM user interface
- Document import through various scan solutions
- Possibility of document mass import
- Document indexing during capture
- Automatic document import via monitored folders
- Ability to define mandatory fields in the Drivve | DM input mask

Space Management

- Classification of spaces
- Central access to documents belonging to a certain process
- Context-oriented document filing and retrieval
- Custom fields for space indexing
- Possibility to create personnel spaces, logistics spaces, project spaces etc.
- Supporting one level of sub-spaces
- Management of project or space duration
- Full-text search of spaces and documents within spaces
- Management of document linkings
- Creation of notes associated to spaces
- Allocation of workflows to spaces
- Ability to link documents to multiple spaces

Document Management

- Storage of any kind of document (Email, Microsoft Office documents, PDF, CAD, etc.)
- Document approval
- Version control
- Check-in/Check-out
- Editing of Microsoft Office documents directly from within the system
- Keeping an audit trail of document changes — who, what, when
- Personal/ Group inboxes
- Compliance with existing laws and regulations (GOBD, HGB, ZBO, BDSG, GDPR)
- All requirements for revision safety thanks to compliance with HGB, ZPO, AO and BDSG
- No restrictions as to number of documents or size of the document storage
- Import and storage of document metadata
- Document numbers and bar codes
- Document filing based on pre-defined filing structures (cabinet, drawer, folder, binder)
- Ability to classify and organize records based on pre-defined index values
- Document retention periods
- Flexible and intuitive indexing
- Central and web-based administration
- Possibility to create filing structures, document and filing types
- Assign archived documents to spaces, workflows and projects
- Assign notes to a document, space or workflow
- Possibility to define filing shortcuts for frequently needed filing locations
- Viewing and editing of document indices
- Document download and printing
- Template management for emails and notes
- Clipping functionality for documents belonging together (for example orders, delivery notes and invoices)
- Annotations, e.g., text highlights, sticky notes and stamps can be added to the document
- Digital signature including a signature image may be added to a document
- Meta values from Factur-X compliant documents can be extracted

Search & Retrieve

- Full-text search over all supported data types contained in the system, including metadata and notes
- Search for partial terms like "starts with", "end with", "contains"
- Search including "and-" and "or-conjunction" possible
- Restrict the search to field types like date and numbers
- Combination of several terms and field contents within one search
- Memory function for regularly used search combinations on system and user level
- Various document views
- One search mask for all documents
- Ability to search across different formats
- Find documents by time frame, document type, filing location etc.
- Thumbnail document preview
- Quick overview of important documents, spaces, and workflows via individually configurable dashboard

Workflow Management

- Individual creation of ad-hoc workflows
- Provision of pre-defined workflow templates
- Easy creation of workflow templates in the web interface
- Automatization of processes
- Priorities and due dates
- Automatic workflow distribution
- Automatic initialization of workflows by rules
- Private inbox
- Workflow notification service
- Individual allocation of the workflow subject
- Due date monitoring and alert service
- Record journal indicating record changes and which user changed the record
- Creation of notes associated to workflows
- Standardized and individual workflow control
- Linking of related documents and spaces to a workflow
- Distribution of data sets via email, internal link and private cloud
- Comprehensive rights concept
- Prioritizing of individual workflows
- Adaptation of the workflow overview to the workflow priorities
- Controlling view for workflows according to rights management
- Workflow search by owner, subject, status etc.
- Possibility to individually adapt and alter workflows
- Creation of linear workflows like follow-ups, reminders, auditing etc.
- Email notifications for overdue workflows
- Substitutes
- Support for four eyes principle by selecting multiple users taking a workflow step
- Ability to manage your workflows with mobile app
- Task list filter to see relevant tasks only
- Full history of workflow kept in database for later review
- Rewind a workflow to a previous step
- Cancel a workflow (requires additional permission)

Collaboration

- Mobile Apps for Android and Apple iOS devices
- Ability to share documents as temporary public links
- Distribution of documents via email
- Access to workflows from your mobile device
- Browser-based architecture to provide access from every Internet capable laptop or PC
- Cloud solution for mobile access
- Group-based inboxes
- Assign workflow steps to multiple users or groups
- No simultaneous editing of the same document thanks to check-out function
- Ability to assign document to user or group inbox
- Template creation for other users
- Easy collaboration with external persons via guest licenses with limited permissions

System Architecture

- Drivve | DM always comes with a seamlessly integrated database
- The underlying object oriented database is specifically designed for document storage
- Web-based architecture without client installation
- Volume-Based Container Storage (VBCS) provides the most efficient storage of your document data
- Incremental back-up possible to secure your data is easy and highly efficient, as only the most recently created document container is actually altered. Once a container has been filled to its defined size, it doesn't change.
- Storage capacity for an unlimited number of documents
- Easy data exchange with third-party applications
- Database is integrated in the authentication process
- Identification of single users, via both the Drivve | DM log-in and at single sign-on, with automatic Windows authentication
- All relevant system activities are logged
- Easy to manage back-up structure

Rights Management

- Integrated user management with the possibility to add an unlimited number of users
- Group-based rights: define unlimited different groups and sub-groups with specific permissions
- Role-based rights: define access rights based on roles instead of groups
- Permission-templates: define rights-templates for stereotypes and assign them to users and groups
- Security and user management with users, groups and roles
- Access restriction based on content
- Possibility to define users, groups and roles
- Access to documents by types of defined users and groups
- Support for Active Directory user and groups synchronization
- Single-Sign-On within Microsoft Active Directory
- Definition of document access rights based on filing location
- Guest licenses with significantly reduced rights (limited by the system)
- Ability to switch between entities with one login

Bookkeeper

- Administration, allocation and assignment of voucher
- Administrate ledger accounts, cost centers, cost units and projects
- Definition of VAT rates and VAT codes as well as document types or filing shortcuts
- Definition of the ledger currency
- Import of ledger accounts, cost centers and cost units from CSV file possible
- Import suppliers and projects via CSV file or by linking to Drivve | DM spaces
- Set net / gross as the default for account assignment
- Define an automatic mapping of default index values to the booking record
- Selection of the creditor and ledger accounts by auto-complete functionality
- Pre-allocation of the amount, invoice number, document date, description
- Ability to split postings with several ledger accounts
- Ability to add a posting text for each separate ledger account
- Option to assign cost center, cost unit and project per ledger account
- Export booking records for further processing
- Manual or automatic (via Drivve | Jobs) export of released booking records
- Target format is a generic CSV output as well as a booking batch in DATEV ASCII format
- Secure booking process via dedicated permissions

Technology

Database

Documents are stored in an object-oriented, container-based vault built to spec over 25 years ago for some of the largest organizations in Europe. Back then, a developer needed to think critically about every byte in order to maintain optimal performance. As a result, the solution contains a highly robust yet nimble storage engine capable of storing a massive amount of data without sacrificing an ounce of performance.

Container-based Storage

Experience high performance, no matter how many documents you need to process. When designing a vault to store an unlimited amount of information, you have to consider how the operating system will effectively manage all that data (storing millions of single files on a hard drive is no longer a consideration). With a container-based storage system, you can search and retrieve data incredibly quickly because it's the optimal structure for any operating system to manage.

XML

The database is encapsulated in an application server that is fully based on XML technology. This speeds development, as there's an efficient communication interface with client software. New features can be added quickly, whether it's a web client or a fat client, because both use the same application tier. Also, other integrators can easily use the app server to design their own connectors to the system.

Generic File Storage

The database is also encapsulated in an application server that is fully based on XML technology, which likewise speeds development due to an efficient communication interface with client software. New features can be added quickly, whether it's a web client or a fat client, because both use the same application tier. Third-party integrators can easily use the app server to design their own connectors to the system.

Web 2.0

The client software uses the most cutting-edge technologies related to Web 2.0, including Ajax, CSS and Web Services. All of these lead to a plug-in-free, browser-based client that acts primarily like a fat client. But you don't need to install any software — just start your browser.

Platform Independency

Because client software is browser based, Drivve | DM can be used on every platform. All of your documents are accessible from any type of computer — whether PC, Mac, or even Linux — so you and yours can easily share documents across different environments.

Security

Drivve | DM uses the most cutting-edge technologies — SSL, RSA Data Security and others — available to lock down your data and lock out undesirables, from the point of scan all the way to storage. The data vault isn't accessible without system authentication, and from that point on, every action is captured in an audit trail.

Mobile Solution

The Drivve | DM Mobile App brings the award-winning, feature-rich and secure document and workflow management to your Smartphone and Tablet. Drivve | DM is fully embedded in the device environment of Android and Apple iOS, so you can easily view your documents anytime you want, from anywhere in the world.

Cloud Security and fail-safety

We offer our document management system either as an in-house server-based installation or Cloud instance. Using the Cloud - which eliminates the need to install and operate the solution on your own server - you eliminate effort related to back-up, maintenance or support costs. In addition, Drivve | DM Cloud offers you superior security & failure protection.

Physical Environment

- The virtual data centers are located in different fire compartments. Data is backed up on a doubly redundant basis and thus fourfold. The network is 100% redundant, because all systems consist of 2 network cards connected to a 100% redundant InfiniBand network.
- 24x7 security service
- 24x7 monitoring system, swipe-card access, biometric identification system, intrusion detection technology and video surveillance
- Emergency power supply– 8 diesel engines with an overall performance of 12.800 kVA
- Environmental Monitoring – Host computer environments, including temperature, humidity and power-supply quality, are monitored to identify conditions that might adversely affect the operation of computer equipment and to facilitate corrective action.
- Capacity Planning – Capacity requirements are monitored and future requirements projected, to reduce the risk of system overload.
- European data centers are based in Germany and respect the GDPR and data security policies.
- Certifications of the data center:
  - ISO 9001
  - ISO 27001
  - PCI-DSS
- Capacity Planning – Capacity requirements are monitored, and future requirements projected, to reduce the risk of system overload.

Network Management

- Protection from Malicious Software – Precautions are taken to prevent and detect the introduction of malicious software to safeguard the integrity of software and data.
- Virus Controls – Virus detection and prevention measures and appropriate user-awareness procedures have been implemented.
- Network Monitoring – 24/7/365 security monitoring of our network. Security of computer networks are monitored 24/7/365 and managed to safeguard information and to protect the supporting infrastructure.
- Network Security Controls – Appropriate controls ensure the security of data in networks and the protection of connected services from unauthorized access.

Electronic File Access

- Encryption – The communication between the stored data and the file server is encrypted using the highest available encryption level and leverages encryption for secure transfer of data.
- Secured Socket Layer – All communication is delivered over an industry-standard 256-bit encrypted SSL.
- Access Controls – User access to files is strictly granted on permissions basis, which administrators can easily change.