iPortalDoc

Connecting **People** to their **Documents, Processes** and **Communications**

Agenda

Management of Documents, Processes and Communications

Basic Processes

Macro Features

Modules & External Applications

Architecture of the Solution

References

Management of Documents, Processes and Communications
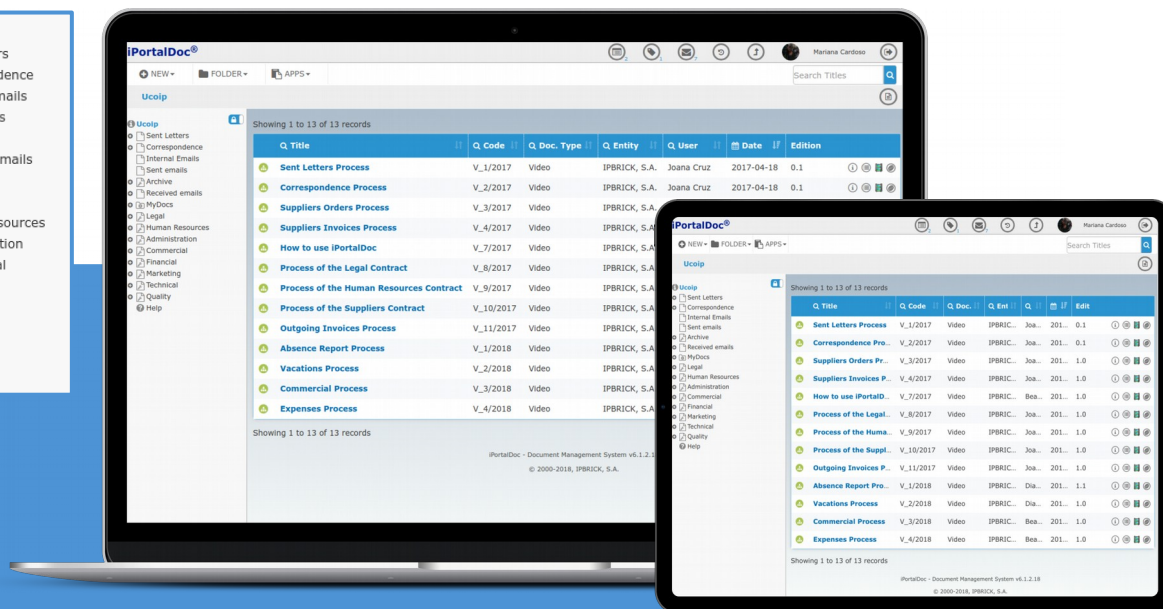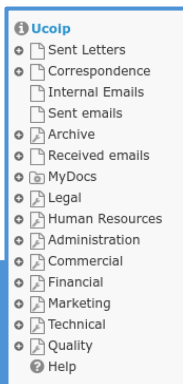
Management of Documents, Processes and Communications

- iPortalDoc is a Document and Process Management system with workflows, that operates On-premises and in Private Cloud

- It integrates, in a native way, with a Unified Communications Center, which allows Calls, Emails and Chat Conversations to be recorded in the Document Management and to be associated to documents/processes to which they relate, being available for consultation at any time

- It is prepared to help all types of companies and institutions in the management of their work processes: Correspondence, Financial, Human Resources, Commercial, Marketing, Legal and others

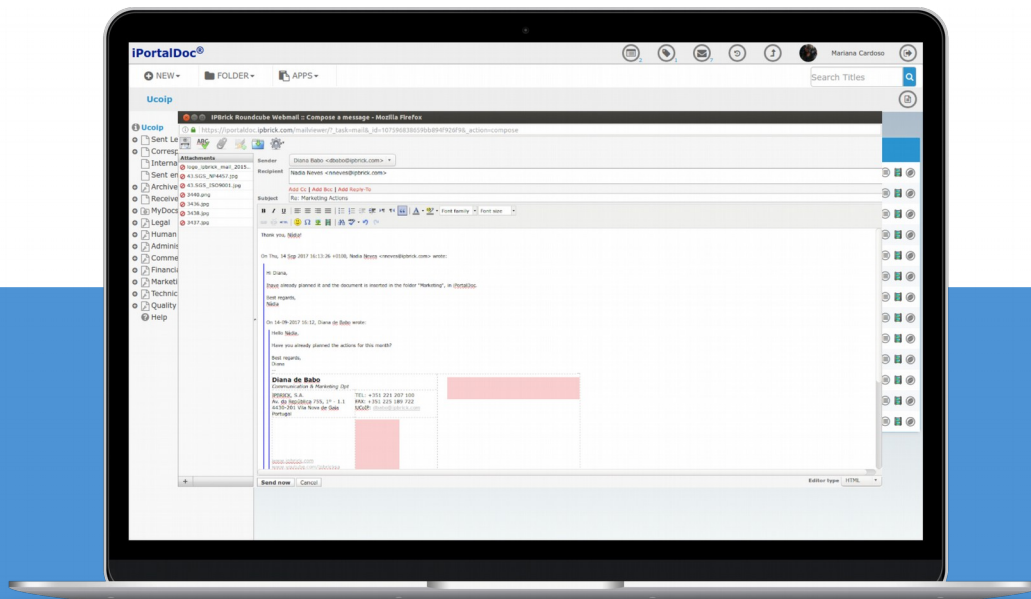# Management of Documents, Processes and Communications
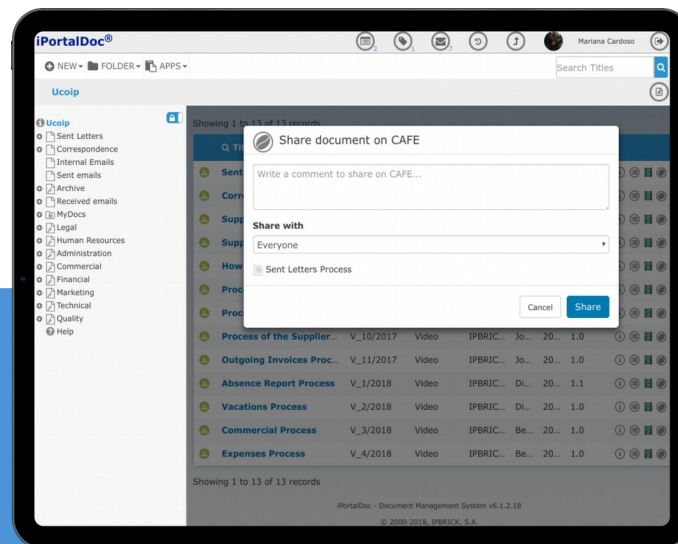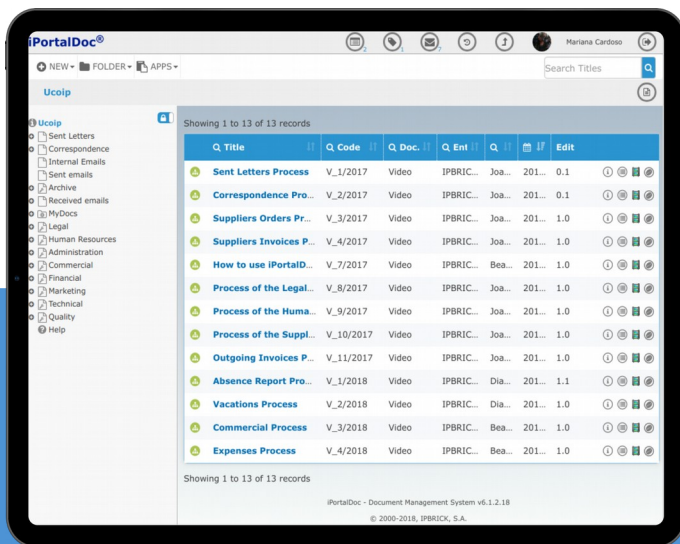
iPortalDoc Interface

iPortalDoc Interface (Mailer)

Management of Documents, Processes and Communications

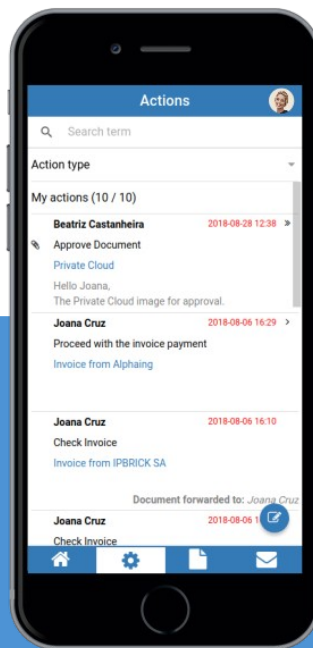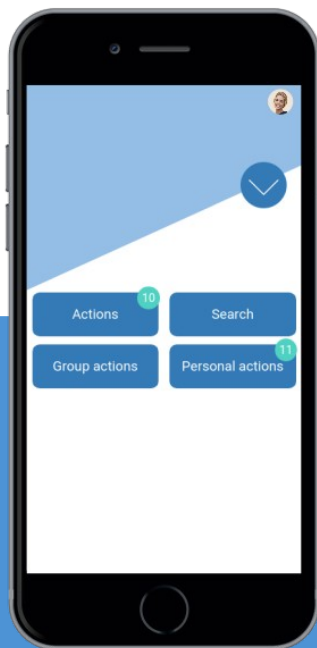## iPortalDoc Interface (Document share)

iPortalDoc Web App
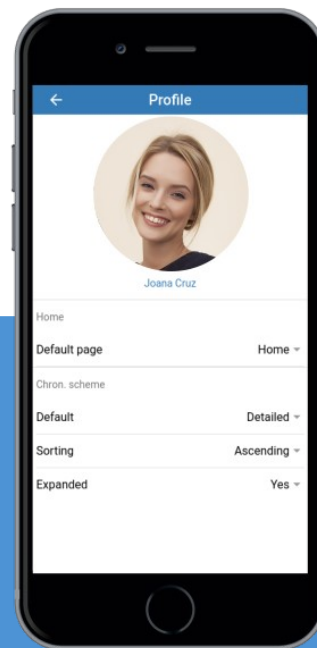
Basic Processes

10 Business Areas

22 Workflows

10 Basic Processes available in iPortalDoc

Administration

Communications
Minutes

Legal

Contracts
Legislation

Email Archive

Internal Emails
Sent Emails
Received Emails

Technical

Reports

Correspondence

Sent Letters
Correspondence

Commercial

Proposals
Budgets
Price Lists
Customers Orders

Financial

Suppliers Invoices
Suppliers Orders
Outgoing Invoices

Quality

Audits
Complaints
Customer and Employee
Satisfaction Assessment
Training
Occurrences

Marketing

Presentations
Events
Images

Human Resources

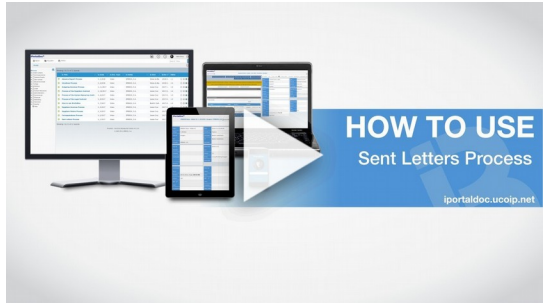Absence Reports
Contracts
Expenses
Vacations

Correspondence

Sent Letters

Correspondence

Basic Processes

Financial

Suppliers Invoices

Outgoing Invoices

Suppliers Orders
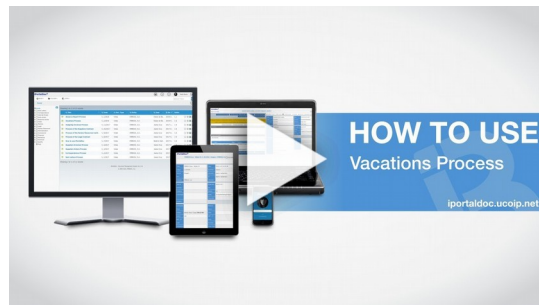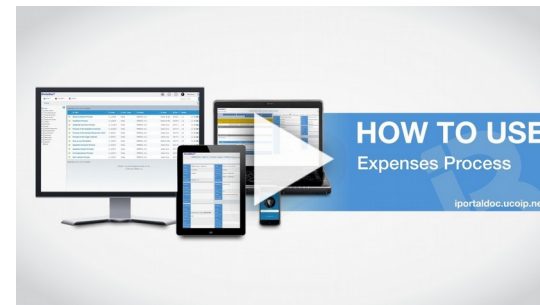
Basic Processes

Human Resources
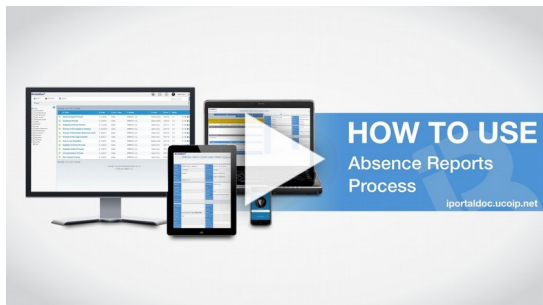
HOW TO USE Absence Reports Process	HOW TO USE Vacations Process	HOW TO USE Expenses Process
iportaldoc.ucoip.net	iportaldoc.ucoip.net	iportaldoc.ucoip.net
Absence Reports	Vacations	Expenses

Basic Processes

Commercial
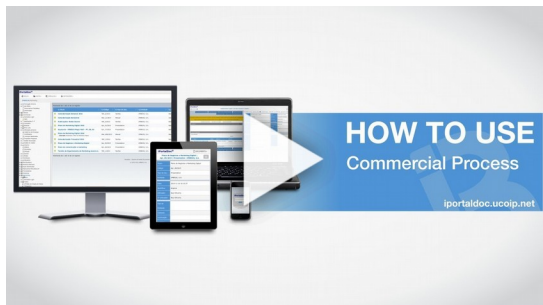
Commercial

Legal

Human Resources Contract
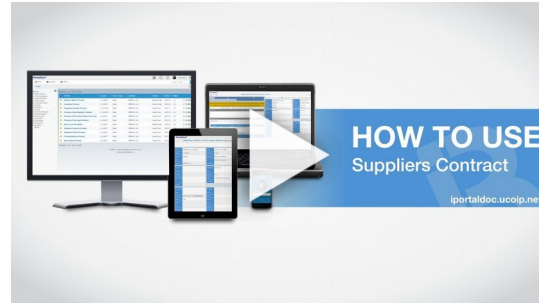
Suppliers Contract

Legal Contract

Features – Document Management

- Insertion of documents (via interface or drag and drop)
- Forwarding of documents (simple forwarding or with pending action)
- Association of documents (with search and without search)
- Association of e-mails to documents/processes
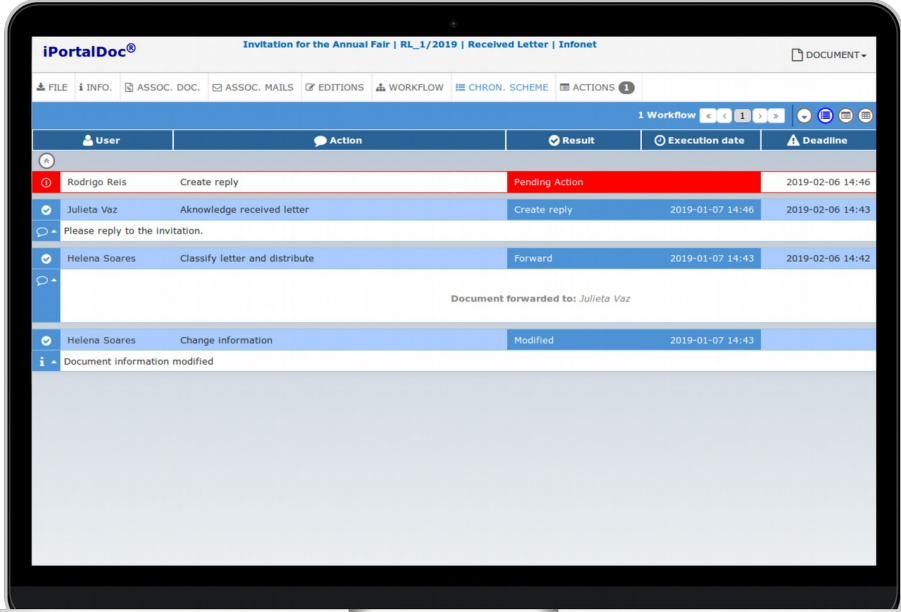- Link documents (document available in several folders with a single insertion)

Features – Process Management

- Chronological Scheme

- State Diagram

- Actions

- Notifications

Chronological Scheme

Consult each step the
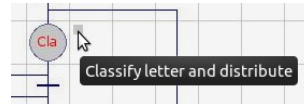document went through,
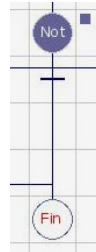including the participants
in the processes

State Diagram
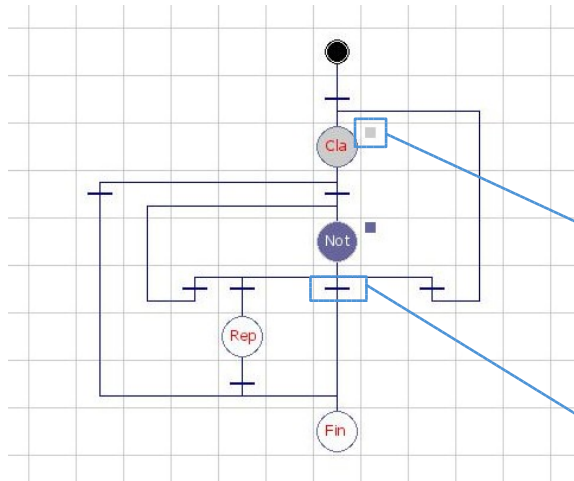
● State of the Process (I already went through)

● State of the Process (where I am)

○ State of the Process (I didn't get there yet)

Action

Evolution condition from one state to another, which depends on the result of the actions in the state of the process
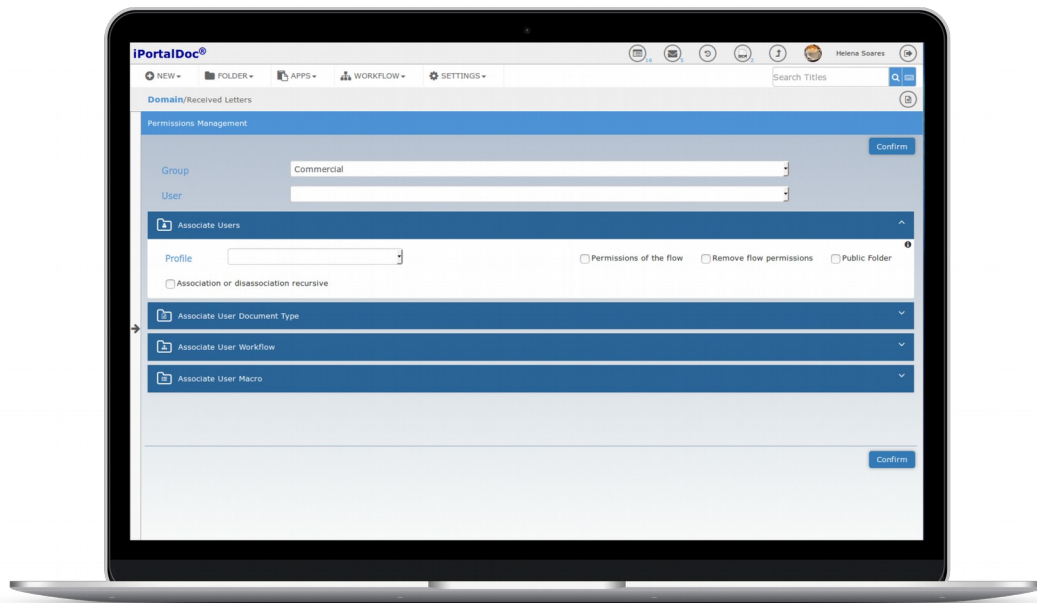
Basic Processes

Actions

- Automatic or *à posteriori* attributions
- Setting of timings to perform tasks
- Possibility to schedule actions in time
- Sending of notifications by e-mail

Management of Groups and Profiles

Each user
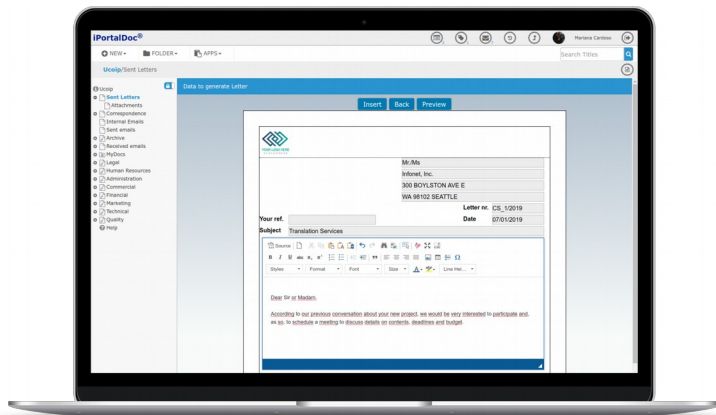
- Accesses to documents concerning its functions
- Holds tasks on documents
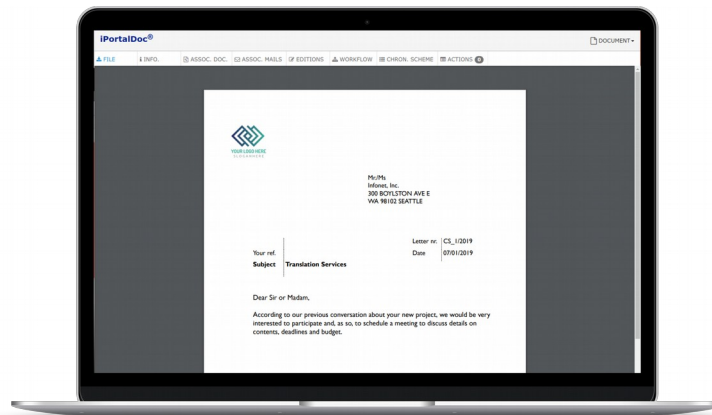
Templates

- Office templates or Web forms

- Streamline the creation of documents

- Standardize the final appearance of the documents (PDF)

- Form with automatic and editable fields + predefined and non-editable formatting

Signatures

Signature with certificate

Digitalized signature

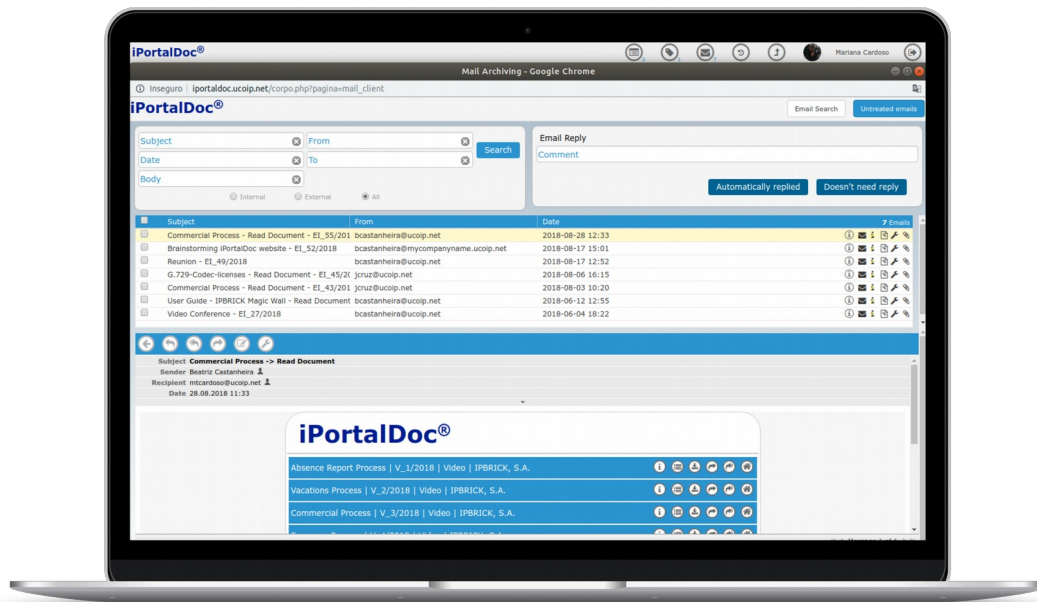Signature with Identification Document

*This type of signature is valid for the identification documents of all European citizens.

Macro
Features

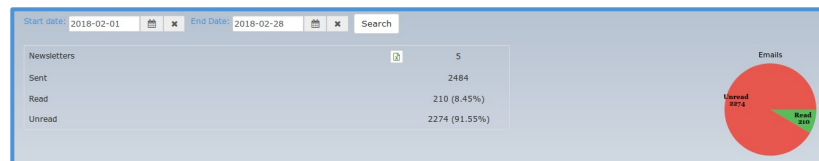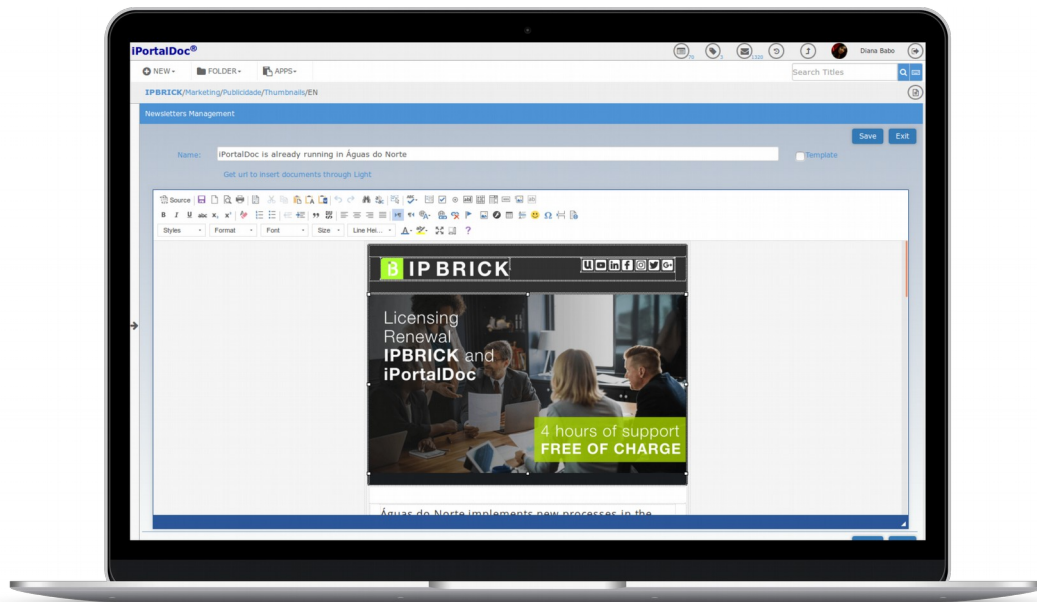# Email Archiving and Management

Have you ever thought that all the important Information of the Organizations is in the e-mail accounts?

IPBRICK Mail Archiving is the system which is **natively implemented in the Document and Process Management application – iPortalDoc,** that allows the complete **integration of e-mails, processes and documents.**
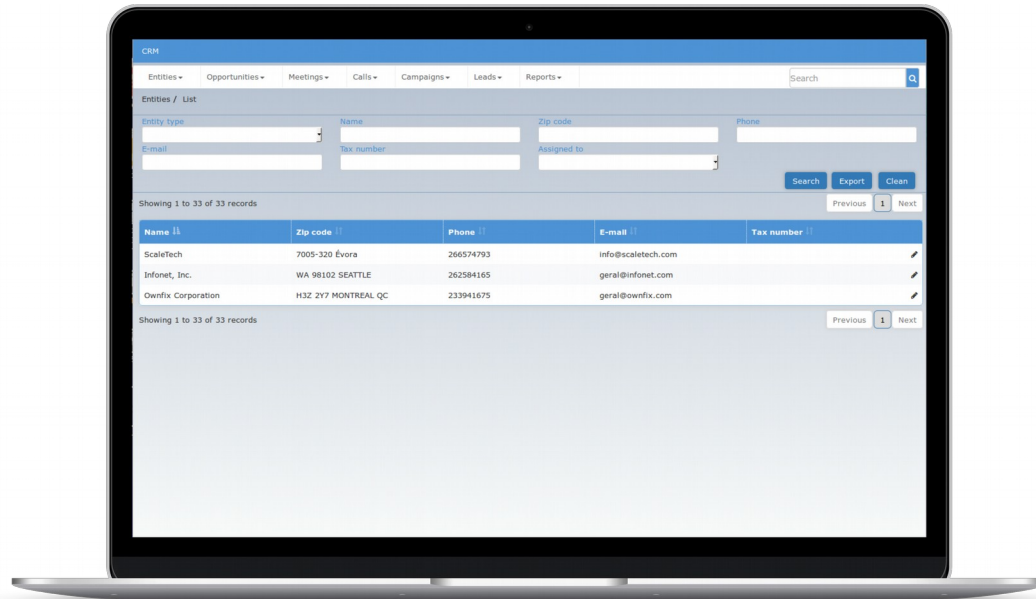
Newsletters

CRM – Customer Relationship Management

- Allows to easily register the date of current and potential clients, business opportunities, foreseen and held meetings, calls and exchanged e-mails
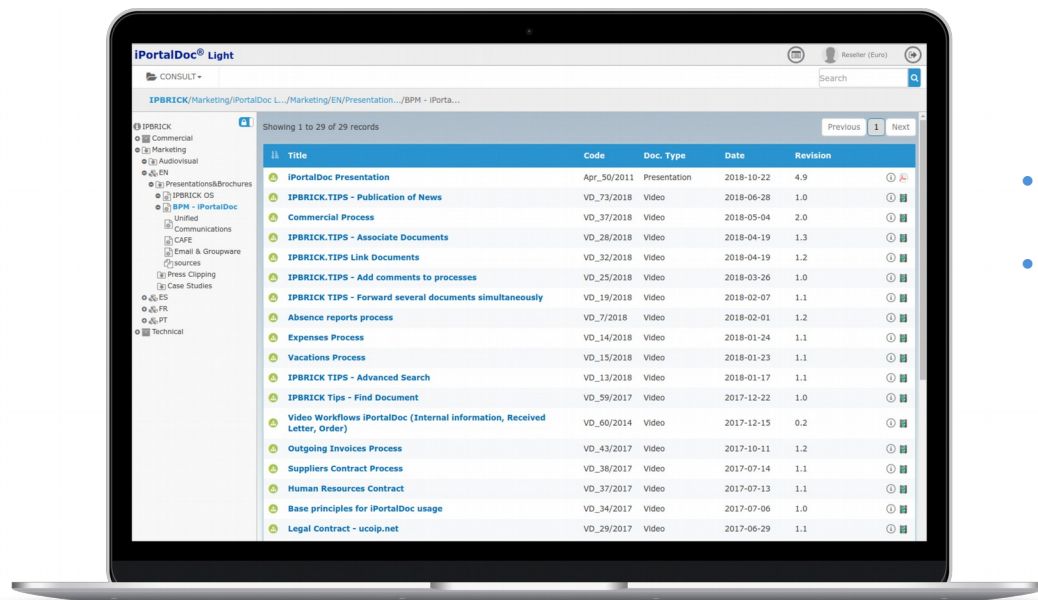- It also allows to obtain statistical reports on this activity

OCR

Through the **OCR module,** it's possible to **read the text** present in a document, in order to **retrieve information for its classification and respective insertion in iPortalDoc.**
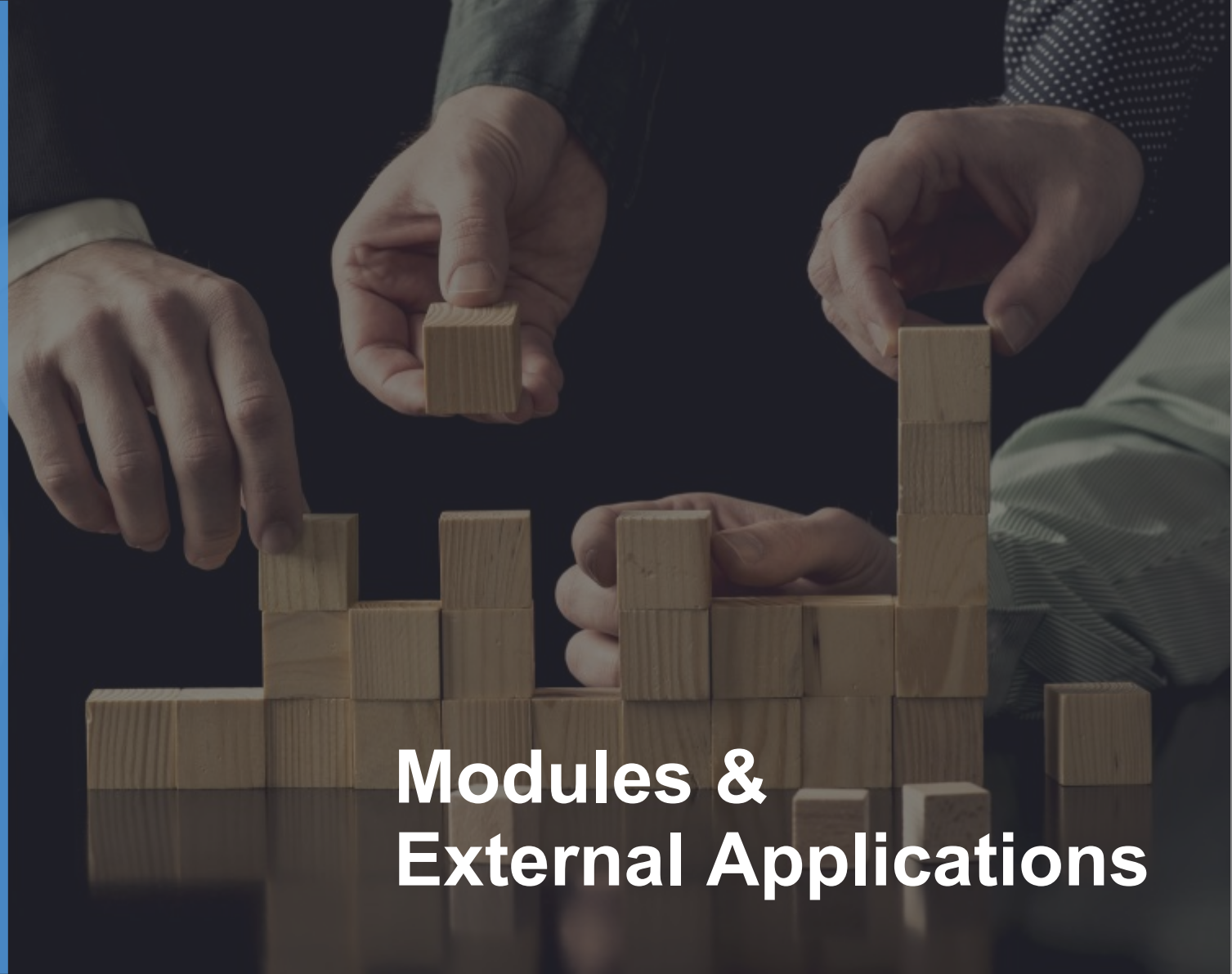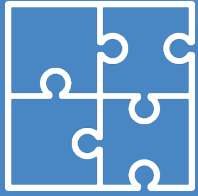
External Portal | iPortalDoc Light

- Access to documents by external entities

- Electronic invoicing

Modules &
External Applications

Modules of iPortalDoc

- Meetings

- Contracts

- Parish Councils

- Projects

Integrations with external applications

- ERPs
- CRMs
- Sigs
- Entrepreneur's Desk
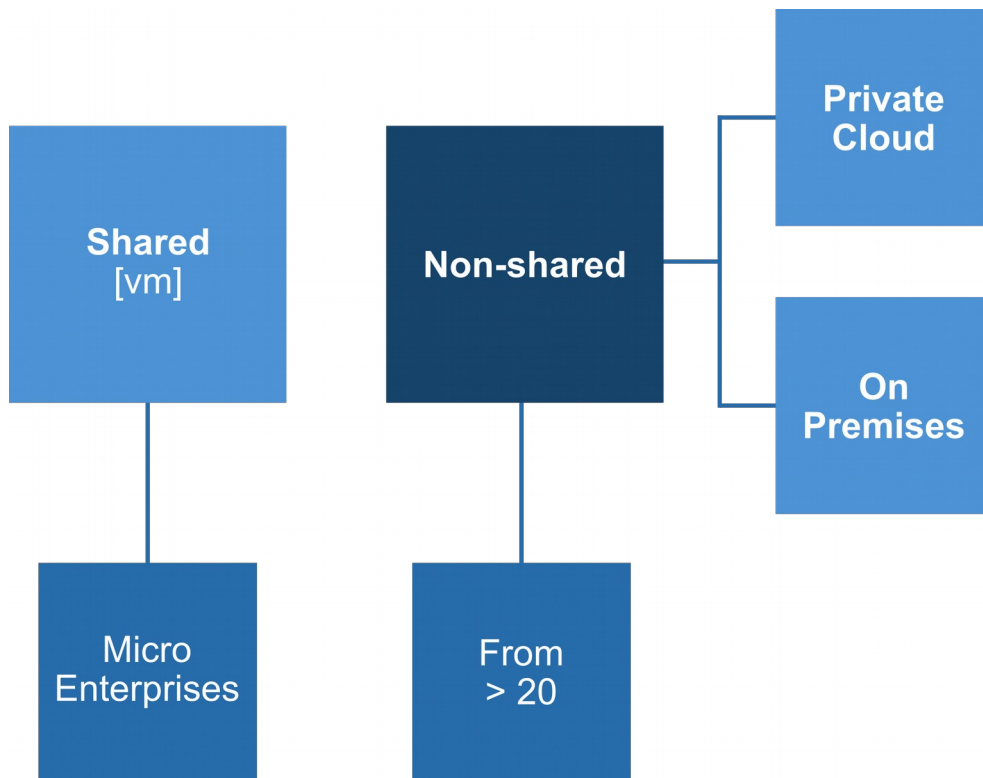
Architecture of the Solution

Who are the potential clients?

Which is the target market for these solutions?

Architecture of the Solution
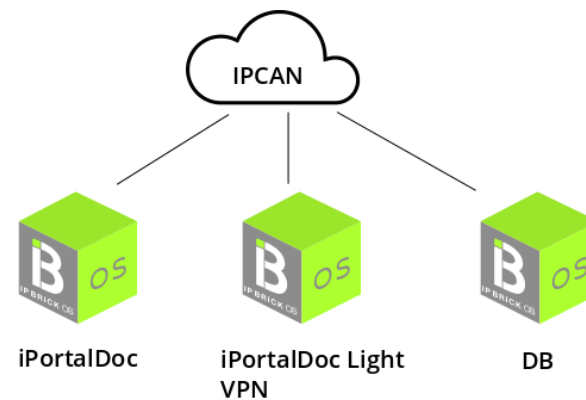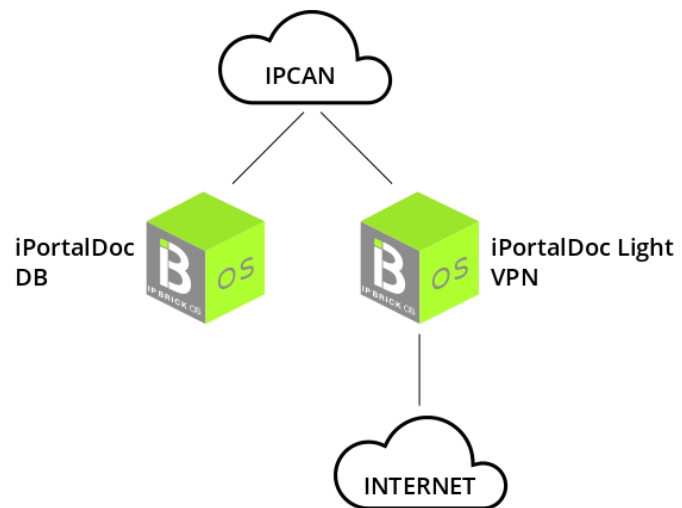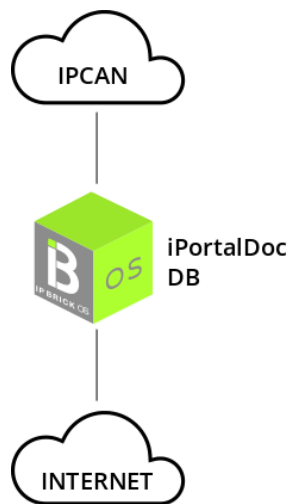
Shared
[vm]

Non-shared

Private
Cloud

On
Premises

Micro
Enterprises

From
> 20

Architecture of the Solution

References

Public and Local Administration

Companies

Utilities

ÁGUAS DO NORTE
Grupo Águas de Portugal

ÁGUAS DO CENTRO LITORAL
Grupo Águas de Portugal

SMAS
MUNICÍPIO DE ALMADA

Porto.
Águas do Porto

POLITÉCNICO DE LISBOA

TRUST
GESTÃO INTEGRADA DE SAÚDE

CHMA
Centro Hospitalar do Médio Ave, E.P.E.

HOSPITALOVAR
DR. FRANCISCO ZAGALO

Centro Hospitalar
Cova da Beira, E.P.E.

centro hospitalar
do Porto

Universidade do Minho

IPCA
INSTITUTO POLITÉCNICO
DO CÁVADO E DO AVE

CITEX | CAMARA DE LA
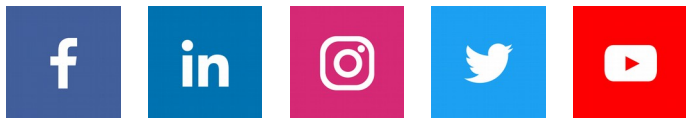INDUSTRIA TEXTIL
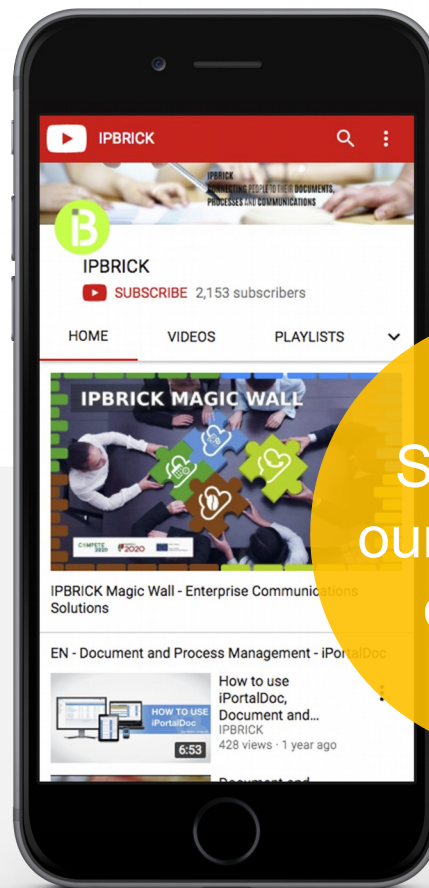PUEBLA/TLAXCALA

mx MODATEX

IPBRICK ON SOCIAL MEDIA

IPBRICK www.ipbrick.com

iPortalDoc www.iportaldoc.pt/en

Subscribe our **Youtube** channel