



The innovative and reliable document management solution.  
Drive | DM's combination of enhanced functionality and usability  
makes managing your processes easier, faster and better.

let . work . flow





In this Whitepaper for our Document Management Solution Drivve | DM you will find all information regarding functions and benefits as well as technology and specifications. Also, we put together all the information regarding security and failure protection of the Drivve | DM Cloud instance. If you have questions concerning a certain project or our solution in general, please don't hesitate to contact us.



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The innovative and reliable Document Management System – Drivve | DM designs your processes easier, faster and better - thanks to better functionalities and ease of use.

Drivve | DM is a secure, yet stunningly elegant document management system. Capture, store, find, share, workflow and manage any type of digital content and scanned images from your PC, Mac®, tablet or iPhone. The browser-based solution makes your documents instantly accessible within your company and beyond.



### Reduced Costs

- Minimum training and support required
- Reduce internal document shipping costs
- Avoid late-payment fees and penalties
- Minimize paper document storage costs
- Remove infrastructure overheads, use Drivve | DM Cloud



### Productivity

- Stop wasting time while looking for the right document
- Automate manual, error-prone, business processes
- Improve team collaboration through powerful document workflow
- Increase the efficiency of your business processes, in particular accounts payable, sales order processing and human resources



### Security & Compliance

- Multi-layered, comprehensive security & user management
- Keeps a full audit trail of every event in the system
- Controlled access to your company's confidential information
- Underpins corporate governance & regulatory compliance
- Assists compliance with GOBD, HGB, ZBO, BDSG, Sarbanes-Oxley etc.



### Business Efficiency

- Improve response time to customer inquiries by ensuring instant access to requested information
- Optimized administration and organization of your documents
- Process invoices and other inbound correspondence faster
- Intelligent information management with Live Archive® Technology



### Collaboration

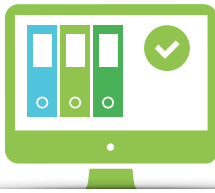
- Have your documents at hand, in the office or on the go
- Share information & workflows with the whole team
- Share documents online using Drivve | DM cloud service
- Dedicated Apps for Apple® iPhone® and iPad®
- Simple handling via all common internet browsers



### Usability

- Provide users with a simple and elegant user interface
- Central and easy installation & configuration
- Self-explanatory administration of files & filing structure
- Seamless integration to Microsoft® Office applications
- Complete package including data base





## Document Capture

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



## Storage & Document Management

- Benefit from flexible yet familiar filing structures in filing cabinets, file folders and registers
- Link archived documents to file folders, workflows and projects
- Full version control & check-in/ check-out function for documents
- Protects your documents from the capturing to the archiving & deletion



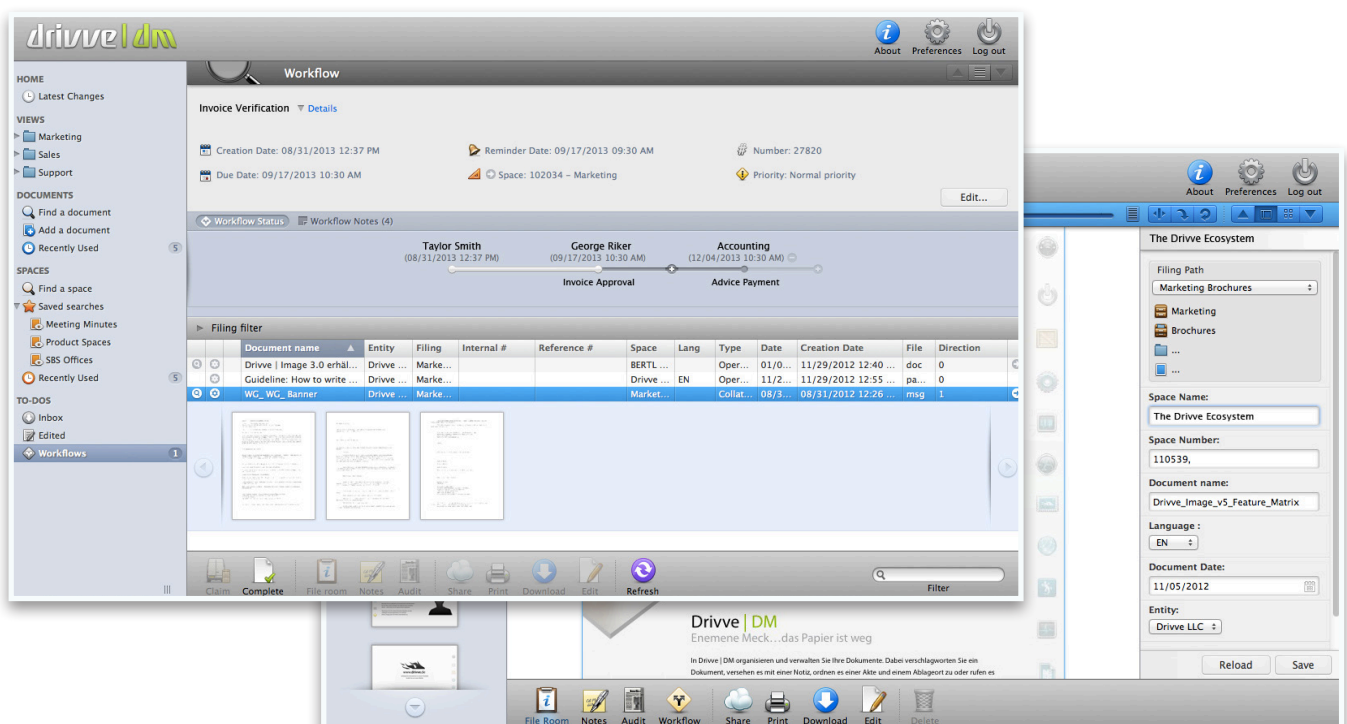
## Search & Retrieval

- Full-text search & context-oriented search engine
- Combine several terms and field content in one search
- Save favorite searches
- Create different views of your documents
- Search Spaces for required documents



## Workflow & Collaboration

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





Drivve | DM offers you the perfect combination of exceptional user-friendliness, an extremely powerful system including database, a variety of efficient functionalities 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 scan solution 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 straight into the archive
- Allocation of the document to the assigned personal 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 thanks to monitored folders
- Definition of mandatory fields in the Drivve | DM input mask



## Document Management

- Files all kinds of documents (email, Microsoft Office documents, PDF, CAD, etc.)
- Version control
- Draft and release management
- Expiration of validity period
- Document approval
- Check-in/Check-out
- Editing of Microsoft Office documents directly in the system
- Logging of any type of change to the document — who, what, when
- Personal mailbox
- Compliance with existing laws and regulations (GOBD, HGB, ZBO, BDSG, Sarbanes-Oxley, GLP Compliance, GMP Compliance)
- All requirements for revision safety thanks to compliance with HGB, ZPO, AO and BDSG
- Generic interface for many ERP systems
- No restrictions as to size and number of documents
- Import and provision of document meta data
- Document numbers and bar codes
- Document filing based on pre-defined filing structures (cabinet, drawer, folder, binder)
- Classifies and organizes records based on pre-defined document types
- Document retention periods
- Flexible, intuitive indexing





- Central and web-based administration
- Possibility to create filing structures, document and filing types
- Assign archived documents to spaces, workflows and projects
- Creation of notes associated to the document
- Possibility to define filing shortcuts for frequently needed filing locations
- Possibility to see and edit document indices
- Document download according to rules management
- Document printing according to rules management
- Template management for emails, notes and notifications



## Space Management

- Classification of projects and spaces
- Central access to documents belonging to a certain process
- Context-oriented document filing and retrieval
- Space-specific fields for space classification
- Possibility to create personnel spaces, logistics spaces, project spaces etc.
- Cascading from spaces into spaces
- Management of project or space duration
- Full-text search with spaces
- Management of document linkings (Hyperlinking)
- Display of general contact information in customer spaces
- Creation of notes associated to spaces



## Search & Retrieve

- Full-text search over all data contained in the system, including notes
- Search for partial terms like „starts with“, „end with“, „contains“
- Context-oriented search engine
- Search including “and-“ and “or-conjunction“ possible
- Possibility to restrict the search to field contents like date and invoice number
- 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
- Search over different formats
- Find documents by time frame, document type, filing location etc.
- Thumbnail document preview





## 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 initializing of workflows by rules
- Private mailbox
- Workflow notification service
- Individual allocation of the workflow subject
- Deadline monitoring and alerts service
- Record journal shows record changes and the user having 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
- Adaption 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



## Collaboration

- Apple Apps for iPhone and iPad
- Provision of documents as temporary public internet links
- Distribution of documents via email
- Access to workflows from your mobile device
- Browser-based architecture provides access from every Internet capable laptop or PC
- Cloud solution for networkless access
- Group-based mailboxes
- Assignment of process steps to several possible groups or departments
- No simultaneous editing of the same document thanks to check-out function
- Document assignment to different mailboxes
- Template creation for other users





## System Architecture

- Drive | 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)<sup>™</sup> provides the most efficient storage of your document data - because when the database manages containers of a definable size, data size never impedes performance
- Use of incremental back-up 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
- Automatic back-up function
- Allows import and export via COLD
- Open interfaces allow fast and easy communication with third-party applications
- Server modules communicate directly with storage systems, databases and user directory - and thereby give the system a maximum of security along with easy scalability
- Database is integrated in the authentication process
- Identification of single users, via both the Drive | DM log-in and at single sign-on, with automatic Windows authentication is absolutely secure
- Additional security functions are available that protect highly sensitive documents from being accessed even by system administrators
- Extra protection against manipulation is provided by the logging of all system changes in detail
- Any type of modification or manipulation of archived documents can be ruled out
- 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 rights
- Role-based rights: Define access rights based on roles instead of groups
- Rights-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
- LDAP user-synchronisation
- Integration into Microsoft Active Directory
- Definition of user rights based on the filing structure







### Database

Documents are stored in an object-oriented, container-based vault built to spec over 25 years ago for some of the biggest organizations in Europe. Back then, a developer needed to think critically about every byte in order to maintain optimal performance, a fact that, today, is the germ of this highly robust yet nimble storage engine. It's capable of storing a massive amount of data without sacrificing an ounce of performance. No matter how much content you store in its infrastructure, it never requires an oversize superstructure to keep it all together, which is unique in our industry.



### Container-based Storage

High performance, no matter how many documents you throw into it. 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 isn't even a thought today). 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, which 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 encapsulated in an application server that is fully based on XML technology, which 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.



### Web 2.0

The client software uses the most cutting-edge technologies related to Web 2.0, using Ajax, CSS, Web Services, SOAP. All this leads 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 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, everything is audit trailed.



### Mobile Solution

The Drivve | DM for iPhone application brings award-winning, feature-rich and secure document and workflow management to the iPhone and iPad. Drivve | DM for iPhone is fully embedded in the mobile-devices environment. The COCOA-based technology exploits every possible iPhone feature, so you can easily view your documents anytime you want, from anywhere in the world.





## Security & Failure Protection – Driveve | DM Cloud

We offer our document management system either as an in-house server-based installation or Cloud instance. Using the Cloud - and therefore without the necessity to install and operate the solution on your own server - you benefit from the advantage, that no efforts regarding back-up, maintenance or support costs will have to be made. On top, Driveve | DM Cloud offers you a maximum of security & failure protection.

### Physical Environment

- Secure Areas – IT facilities supporting critical or sensitive business activities are located within secure areas; Photo-ID validated and retained at building reception for each individual entry.
- Physical Security Perimeter – Strategically located barriers around defined perimeters provide physical security protection throughout the facility where sensitive business activities occur.
- Physical Entry Controls – Only authorized personnel can gain access to secure areas. Swipe-card access and/or biometric validation on initial entry to equipment rooms; Separate key access to each equipment rack where server hardware is stored.
- Security of Data Centers and Computer Rooms – Physical security for data centers and computer rooms commensurate with possible threats.
- Isolated Delivery and Loading Areas – Delivery and loading areas of the data center are isolated to reduce the risk of unauthorized access.
- Equipment Location and Protection – Equipment is located corresponding to the lowest risks of environmental hazards and unauthorized access.
- Power Supplies – Electronic equipment is protected from power failures and other electrical anomalies.
- Cabling Security – All power and telecommunications cabling is protected from interception or damage.
- Equipment Maintenance – Procedures are established to correctly maintain IT equipment to ensure its continued availability and integrity.
- Separation of Development and Operational Facilities – Development and operational facilities are segregated to reduce the risk of accidental changes or unauthorized access to production software and business data.
- 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.
- Media Handling and Security – Computer media is controlled and physically protected to prevent damage to assets and interruptions to business activities.
- System Planning and Acceptance – Advance capacity planning and preparation ensures the proper availability of adequate capacity and resources as customer demands grow.
- 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 as well as 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.





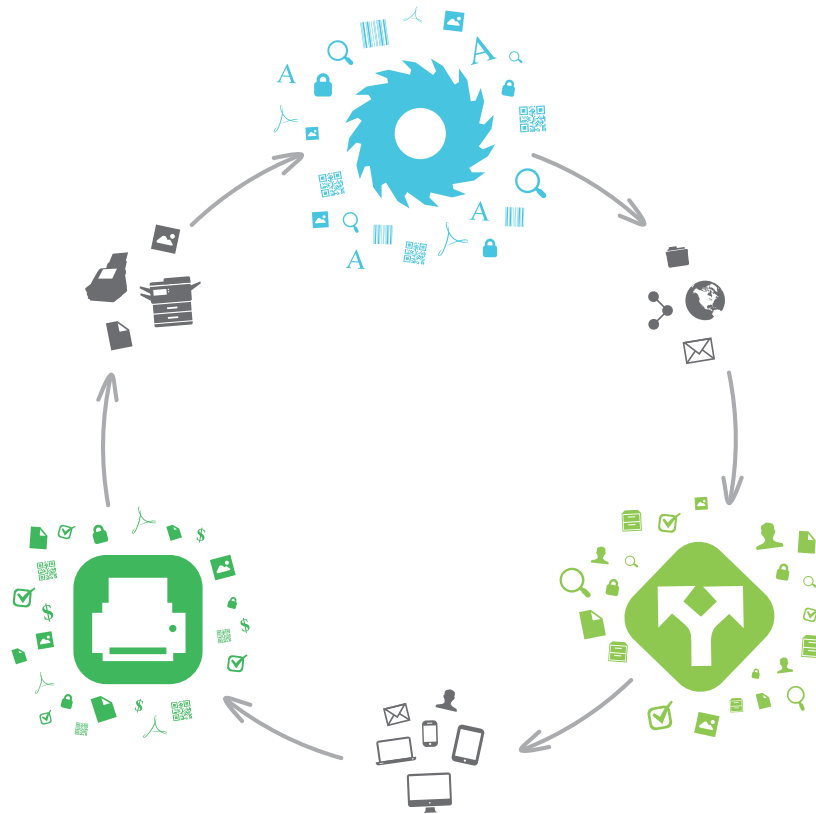
## Electronic File Access

- 256-Bit Encryption – Data stored on the file server is encrypted using the maximum encryption available, 256-bit AES encryption and SSL encryption for secure transfer of data.
- Secured Socket Layer – All communication is delivered over an industry-standard 128-bit encrypted SSL.
- Access Controls – User access to files is strictly granted on permissions basis, which administrators can easily change.

## Policies and Procedures

- Data Handling Procedures – Procedures exist for handling sensitive data to protect such data from unauthorized disclosure or misuse both when on-site or in transit.
- Clear Desk Policy - A clear desk policy is enforced for sensitive material to reduce risks of unauthorized access, loss or damage outside normal working hours.
- Removal of Property – Personnel are required to have documented management authorization to take equipment, data or software off-site.
- Operational Procedures and Responsibilities – Responsibilities and procedures are established for the management and operation of all computers and networks.
- Documented Operating Procedures – Operating procedures are clearly documented for all operational computer systems to ensure their correct, secure operation.
- Incident Management Procedures – Incident management responsibilities and procedures are in place to ensure a quick, effective, orderly response to security incidents.
- Operational Change Control – Documented procedures are established for controlling changes to IT facilities and systems to ensure satisfactory control of all changes to equipment.
- Data Backup – Documented procedures are established for taking regular backup copies of essential business data and software to ensure that it can be recovered following a computer disaster or media failure.
- Operator Logs – Routine procedures are established for taking backup copies of data, logging events and faults, and where appropriate, monitoring the equipment environment.
- Management of Removable Computer Media – Procedures exist for the management of removable computer media such as tapes, disks, cassettes, and printed reports.
- Fault Logging – Procedures exist for logging faults reported by users regarding problems with computer or communications systems, and for reporting and taking corrective action.
- System Acceptance – Acceptance criteria for new systems are established and tested prior to customer rollout.
- Vulnerability Testing – Procedures exist to test for all OWASP categories of vulnerabilities on an ongoing basis.





Drive offers you an innovative, award-winning ecosystem of software solutions and services that streamline and improve document intensive business processes. Drive solutions help to optimize the entire document lifecycle, from image capture and processing, to document management and workflow, to print and output management and everything in between.

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