



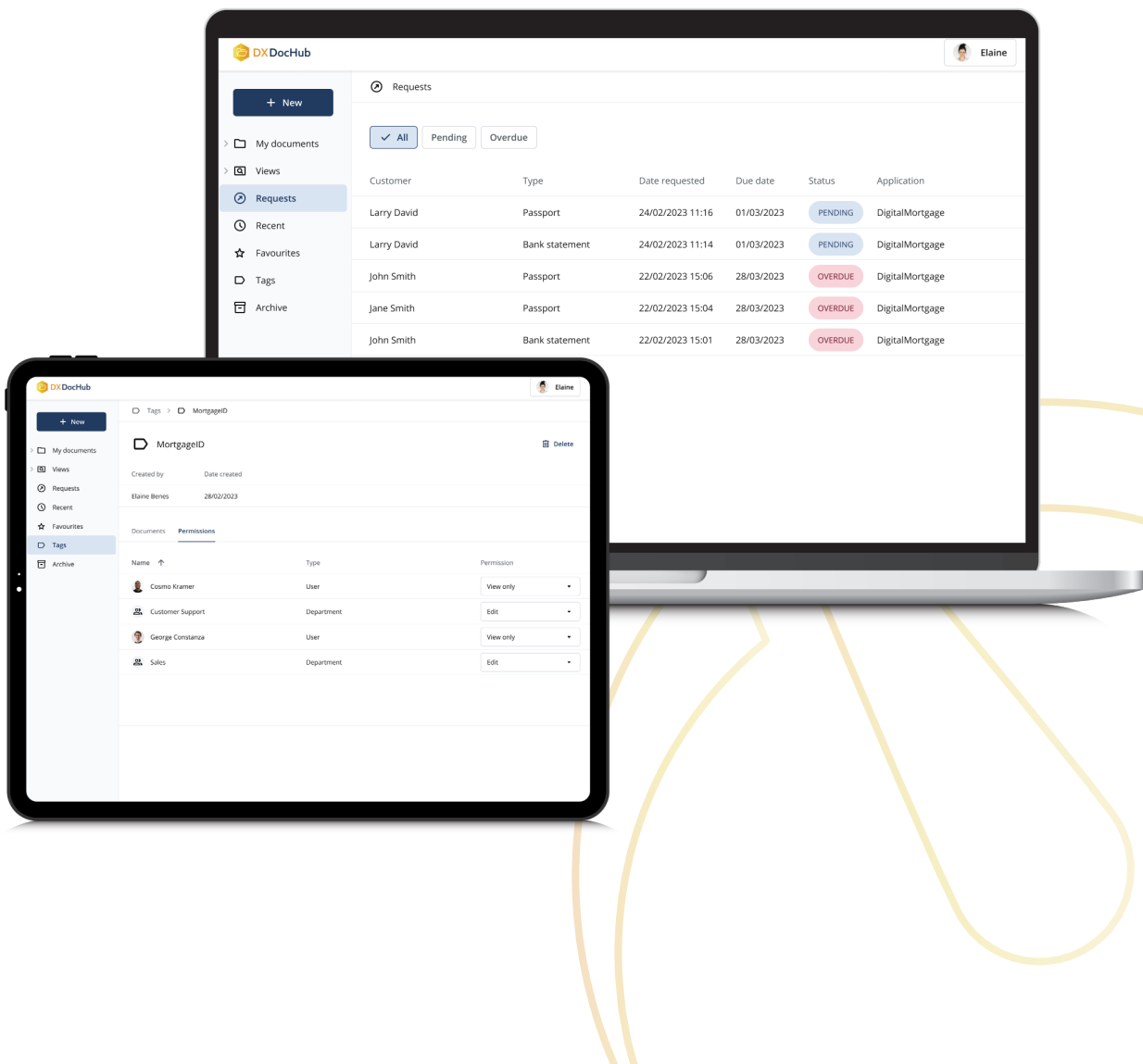
Enhance and simplify your document management.

Requesting, validating,
approving and storing
documents electronically
has never been easier.

Smartly manage your documents without building a new tool

DX DocHub is a document management application that enables business users to manage, track and store documents electronically. Our accelerator is a sophisticated tool that can be added to any OutSystems application, giving comprehensive functionality without development.

DX DocHub allows you to automate document requests and end users to upload the files easily. Received documents proceed through automated validation and approval workflows and are stored in the cloud-based storage service of your choice, be it AWS S3 buckets, Azure Blob Storage, Sharepoint and others. You and the business stakeholders have complete control and visibility over the document workflow, while end users are advised of the progress of their documents.



What problems does it solve?

Many businesses today find it challenging to manage documents handled in their B2E, B2C or B2B applications. Some still rely on manual processes such as email, pdfs and phone calls to request, receive, validate and approve documents.

This manual approach is plagued by:

- » **A lack of visibility and control**
- » **Inefficiencies and delays**
- » **Document storage issues**

Some development teams spend considerable time building interfaces to request files and workflows to approve them. They must use connectors to storage services and build custom integrations to access third-party services, such as electronic signatures and Optical Character Recognition (OCR) for document digitisation and validation. Business users lack a way to properly manage their documents with the right level of permission and versioning.

The development approach to document management is:

- » **Repetitive and time-consuming**
- » **Expensive due to development and maintenance costs**
- » **Limited in the functionality it provides**

Other businesses opt for sophisticated document management tools, which are complex, hard to use, expensive and not always easily embedded into OutSystems applications.

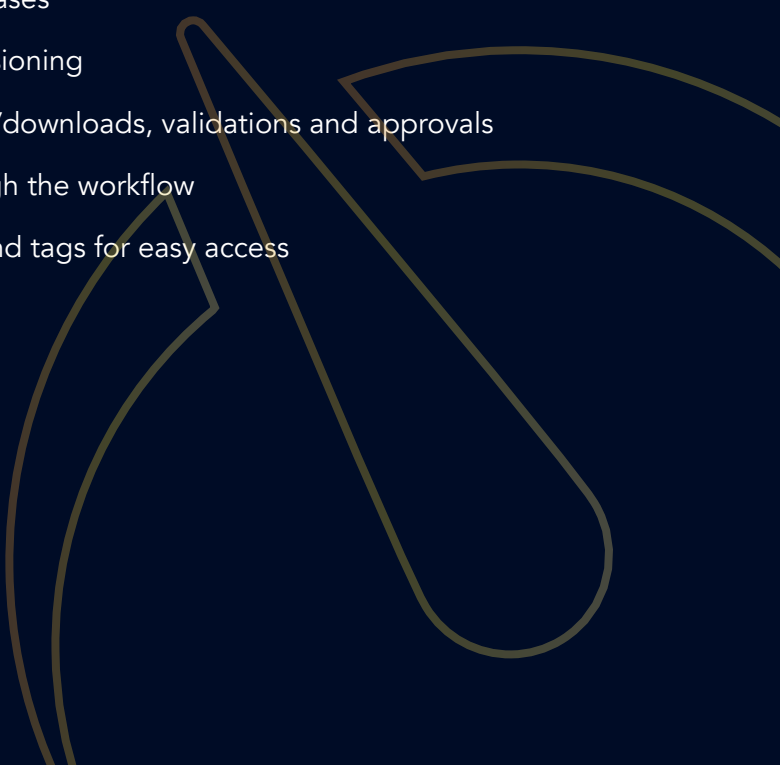
How does DX DocHub help?

DX DocHub overcomes these challenges by offering IT managers, Product Owners and developers a full set of functionalities needed to make it easier for users to request and manage documents. The accelerator provides immediate access to a secure file upload/download mechanism, prebuilt and extendable workflows, permission settings, document storage configurations and a built-in API to access third-party services.

DX DocHub allows IT to:

- » Accelerate development and reduce backlog
- » Integrate with third-party solutions to access advanced capabilities. i.e. e-signatures and Optical Character Recognition (OCR) for doc digitisation
- » Reduce development costs
- » Deliver sophisticated functionalities without effort
- » Choose any document storage service, be it AWS S3 buckets, Azure Blob Storage, Sharepoint and others
- » Eliminate costs by reducing the multivendor-based document management processes
- » Reduce fragmentation of documents across multiple storage services

It allows business users to:

- » Quickly build simple workflows for documents
 - » Customise workflows for different use cases
 - » Control document permissions and versioning
 - » Automate document requests, uploads/downloads, validations and approvals
 - » Track the progress of documents through the workflow
 - » Organise their document into folders and tags for easy access
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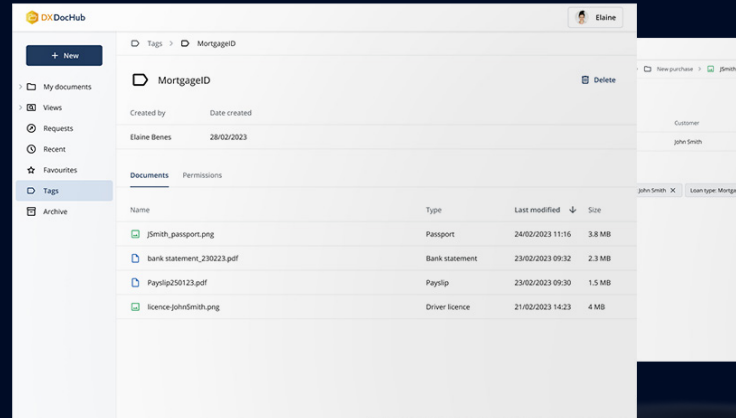
How does DX DocHub work?

Step 1: Initial setup

A developer incorporates DX DocHub into your OutSystems application, including a pre-built file upload widget.

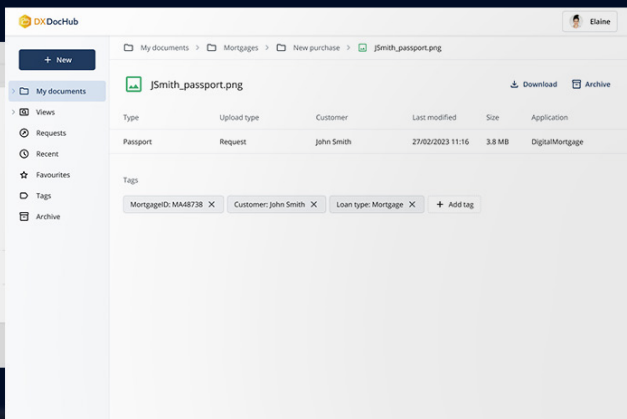
Step 2: Document workflow configuration

An administrator uses DX DocHub to configure various document workflows by nominating different document types, formats and sizes, storage services, validations, user permissions and third-party integrations.



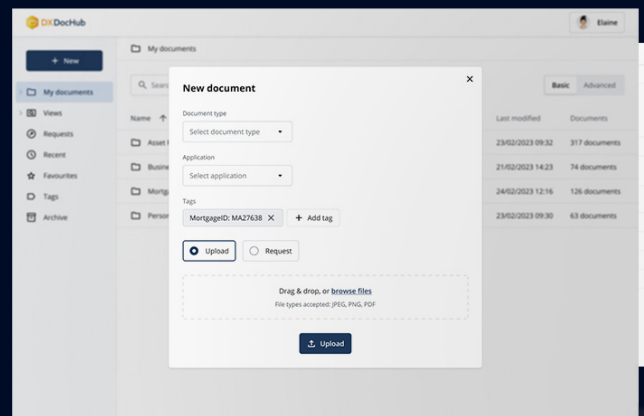
Step 3. Managing document workflows

Business users utilise the DX DocHub console to customise and manage document workflows for various use cases. Within a workflow, they can track the progress of the documents through stages, including document request, upload, validation, review, approval and storage.



Step 4: Easy upload and tracking for end-users

With DX DocHub, end-users are sent a link that enables them to easily upload requested documents and view their progress via email and a user-friendly web and mobile application.



Main features



Create document workflows

Define different workflows that support approvals, rejections and e-signatures based on document type and user profile.



Organise documents using tags and easily find your documents

Documents can be labelled with multiple tags to facilitate the search and visualisation of files in either a hierarchical view or a series of tags.



Safe access and easy permission management

Administrators can define user permissions to access files, plus the access type. i.e. edit or view only.



Automate workflow tasks

A group of tasks can be triggered automatically for a specific document type once it is uploaded and processed. e.g. a passport can be digitally interpreted via OCR to collect a specific field that triggers an approval flow.



Visualise workflow status via dashboard

A user-friendly dashboard serves as a central indexing and management console, providing business users with the status of all documents in the workflow.



Choose any storage service you want

Documents can be stored in multiple cloud-based storage services, such as AWS S3 and MS Sharepoint. DX DocHub is ready to handle file uploads/downloads in all the main storage services.



Flexible file configuration

Documents can be stored in multiple cloud-based storage services, such as AWS S3 and MS Sharepoint. DX DocHub is ready to handle file uploads/downloads in all the main storage services.



Built-in events auditing

Provides comprehensive auditing functionality that allows administrators to track the history of a file throughout all stages of a workflow.

Main features



Use eSign for document approvals

Delivers e-signature capabilities via finger-based touchscreen signatures or easy integration with e-signature providers.



Easy to manage validation rules

Rules can be configured to validate uploaded files. Validation rules can be imported in bulk using Excel.



Versioning

Documents can be versioned so that the history of document changes is recorded.



Use e-mail and one-off links in your workflow

Business users can trigger automated email requests for a user to upload a document via a one-off link.



Provides services to non-OutSystems applications

Non-OutSystems applications can be authenticated with DX DocHub via access tokens. This allows them to access file processing and management services, such as document upload via built-in APIs.



Reusable widgets to accelerate the development

Speeds up development by providing out-of-the-box user interface (UI) widgets that enable end users to upload single or multiple files and manage other transactions.



Accelerate and enhance your OutSystems solutions with DX Accelerators, a suite of applications created to simplify development, speed up delivery and reduce delivery costs. Each DX Accelerator is a pre-built component that can tackle different common challenges.

phoenix-dx.com/accelerators



The complexity of technological ecosystems can make it difficult for enterprise organisations to quickly evolve their digital capability to keep pace with market expectations. PhoenixDX helps IT Leaders deliver enterprise-grade digital solutions that help them run, grow and transform their business while enabling continuous innovation.

PhoenixDX is one of the fastest-growing technology companies in Australia, specialising in rapid application development, leveraging a winning combination of top talent, proven processes, AWS and the OutSystems modern application development platform technologies.

phoenix-dx.com

Talk to us

**Transform your ideas
into digital solutions. Fast.**

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