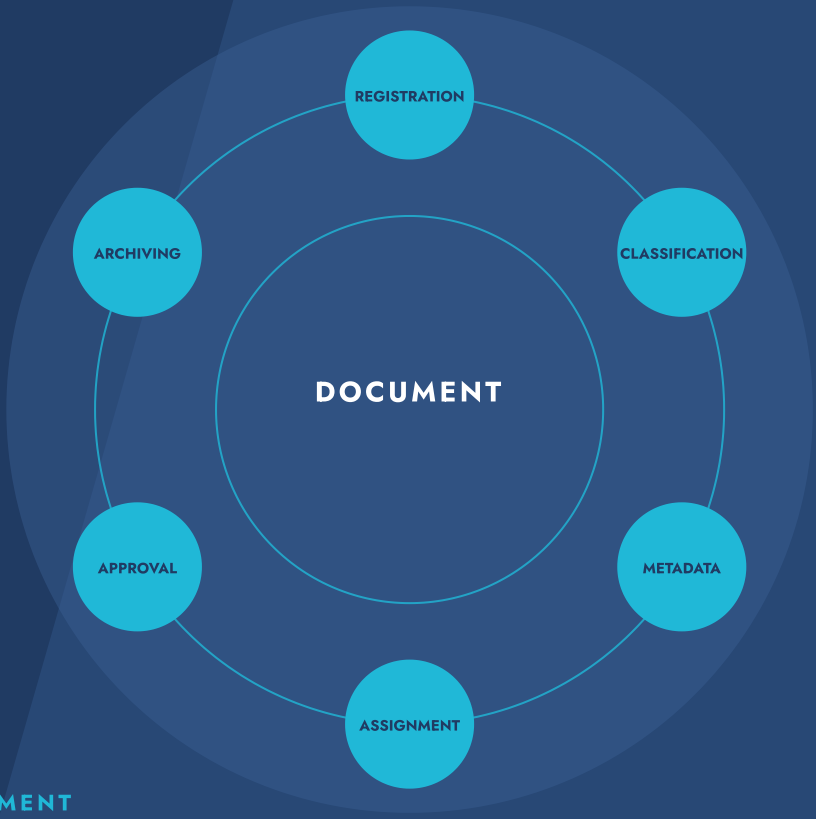
MOBIUS
THE RISK MANAGEMENT COMPANY



DOCUMENT AND WORKFLOW MANAGEMENT

MOBIUS Data, Document & Workflow

Fast access. Organization.
Long-term document safety.

Your support in efficiently managing a large volume of documents: archiving, metadata-based organization, access rights and approval workflows, in a single web application.

A Mobius Software web application for archiving, organizing and routing the organization's documents, with role-based rights and predefined workflows.

MOBIUS SOFTWARE · PRODUCT BROCHURE

OVERVIEW · A WEB APPLICATION, NOT A LOCAL PROGRAM

Documents become organized and controlled information

MOBIUS Data, Document & Workflow supports the organization in efficiently managing a large volume of documents. Its main function is archiving and managing them — document management. Another important function is organizing and building document workflows.

Long-term safety

Archived documents take up less space and can be accessed anytime, anywhere by authorized persons.

Controlled access

What a user can do is limited by the rights granted by the administrator, according to role and department.

Automated processes

Predefined workflows help automate processes in order to increase productivity.

Unlimited
users in the organization

Web
access from the browser, on any operating system

PDF · XML
document import

Web services
integration with other systems

THE DOCUMENT LIFECYCLE

1. **Registration** — file, message, contact
2. **Classification** — folder and nomenclature
3. **Metadata** — retrieval criteria
4. **Assignment** — role, group, owner
5. **Approval** — phases and decision
6. **Archiving** — history and versions

The application is installed on a server and accessed through a web browser, with no installation on users' computers.

THE ORGANIZATION'S CHALLENGES

Questions answered within the same application

DDW turns the everyday questions of users and management into verifiable answers, available instantly.

"Where can I quickly find the document I need?" DDW

Answer in the platform: In Doc Explorer, by choosing the folder and applying filters: name, type, issuing organization, external or registration number, physical archive location, date or the person who entered it.

"How do I prevent two people from editing the same document at the same time?" DDW

Answer in the platform: Through Check Out: the document is temporarily locked for editing but remains available for viewing. The final version can be marked and can no longer be modified.

"Who is allowed to view, modify or delete documents?" DDW

Answer in the platform: Rights are granted by the administrator by role and department. Each user only sees the documents for which they have permissions.

"How do I send a document for approval without physical circulation?" DDW

Answer in the platform: Through workflows predefined by the administrator: the document goes through the established phases, each with a designated owner, and the route is saved for reuse.

"Can I go back to documents and previous versions at any time?" DDW

Answer in the platform: Yes. The application allows access to all documents at any time and keeps version traceability for each document, according to access rights.

DATA, DOCUMENT & WORKFLOW

The application's features

The tools work together, from registering a document to consulting its history, on the same base of users, roles and folders.

01 Hierarchical organization

Documents are organized in folders with a tree structure; a folder can contain subfolders, which in turn contain documents.

02 Metadata and nomenclatures

Files, messages and contacts are added to existing or new folders, grouped through nomenclatures and completed with metadata defined by administrators.

03 Doc Explorer and filters

Filtering by name, document type, issuing organization, external number, registration number, physical archive location, issue date and the person who entered it.

04 Check Out and final version

A user with rights can temporarily lock a document for editing, while others can view it. The document can be marked as the "final version".

05 Rights and confidentiality

Rights are granted by role and department. When an account is created, the system generates a dedicated folder for the user, also accessible to their hierarchical superiors.

06 Document workflows

Predefined approval routes, with linear and parallel phases, a decision-maker and an owner for each phase. Modeling is reserved for administrators.

07 History and versions

Version traceability for each document and access to documents at any time, according to access rights.

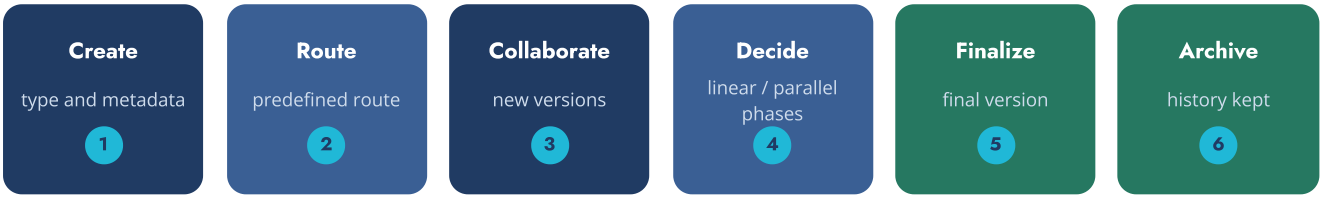
08 Import and integration

Document import (for example PDF, XML) and integration with other solutions or systems through web services, in an application independent of the operating system.

USER, ADMINISTRATOR AND OWNER

From registration to archiving, along clear routes

The document workflow allows documents to be sent along a predefined route — a collaborative environment with precise rules and procedures. Preset routes are saved and can be used whenever needed.



USER	Registers documents, completes metadata, uses the predefined workflows, adds new versions and consults the history, within the limits of the rights granted.
ADMINISTRATOR	Models the workflows (a function reserved for administrators), defines the nomenclatures and metadata categories, assigns roles and creates groups with different rights.
OWNER	Each phase of a workflow is assigned to a user of the system, who processes the document and passes it on or makes a decision.

Process automation

Preset workflows speed up the document route, from creation through the approval phases, and help increase productivity. The working interface for active files provides a graphical tool for an overall view.

COMPLETE RECORDS: CONTENT, ACCESS, WORKFLOW AND HISTORY

Anatomy of a document record

For each new record, filling in the metadata and setting the document type provide the default search criteria needed to retrieve the information of interest later.

1 Identity and type

File, message or contact; the document type set at registration and the name.

2 Folder and nomenclature

Position in the tree structure and grouping through nomenclatures defined by administrators.

3 Retrieval metadata

Issuing organization, external number, registration number, physical archive location, date, person.

4 Rights and access

Permissions by user, role and department; modification and deletion rights granted by the administrator.

5 Workflow and owners

The predefined route, the current phase, the owner of each phase and the decision points.

6 Versions and history

New versions added along the workflow, Check Out or “final version” status and access to the history.

Doc Explorer · search by any of the criteria

Name · Document type · Issuing organization · External number · Registration number · Physical archive location · Issue date · Person who entered the document

Hierarchically organized documents

Choose the folder where the documents are stored, then apply “Filter”. The result is a hierarchically structured view of the documents, according to the chosen criteria.

CONTROL OVER DOCUMENTS AND DECISIONS

Clarity, control, collaboration, traceability

The right document reaches the authorized person, in the right context and version.

CLARITY	Viewing documents structured hierarchically, by folders and criteria.
CONTROL	Rights by role and department; modifying and deleting are not allowed for all users.
COLLABORATION	Predefined workflows, with an owner for each phase and decision points.
TRACEABILITY	Versions for each document and access to the history at any time.

Without MOBIUS DDW

Scattered documents, physical or email circulation; multiple copies of the same file, access that is hard to control and time lost searching.

With MOBIUS DDW

Easy and fast identification through metadata and filters, Check Out and final version, role-based rights, predefined workflows and an archive accessible at any time.

A web application, with no user limit

Access from the browser, independent of the operating system. Documents can be accessed from any computer with access to the network where the server is located.

LARGE VOLUMES AND COMPLEX ROUTES

For organizations with large volumes of documents

The application does not limit the number of users and adapts to the organization's structure through nomenclatures and metadata defined by administrators.

Registry and archiving

Registering, classifying, storing and retrieving documents based on metadata.

Approval and collaboration

Circulation of documents between owners, with linear and parallel phases and decision points.

Internal control

Rights by role and department, versions, final documents and an accessible history.

Technical documentation and contracts

Documentation, contracts and correspondence organized in folders, with metadata and controlled versions.

INTEGRATION IN THE MOBIUS SOLUTIONS ECOSYSTEM

Online Public Services

A digital registry and workflows for requests, using the same document and workflow engine.

MOBIUS UEAM

Technical documentation, service contracts and an electronic archive attached to each asset.

Smart SCIM · BSC · GRC

Documents, procedures and working meetings connected to internal managerial control.

GDPR Compliance

Records, procedures and legal documents for compliance with Regulation 679/2016.

MOBIUS Data, Document & Workflow can work on its own or as the document foundation for the other Mobius solutions, on the same web platform.

OUR INVOLVEMENT AT EVERY STEP

Guided implementation, from analysis to day-to-day use

The Mobius team accompanies the organization from the proceduralization of document routes to user training and operational support.

E1 — E2 — E3 — E4 — E5 — E6

STAGE	WHAT WE DO	RESULT
E1 · Analysis and proceduralization	Analysis of existing document routes and definition of the organization's workflows.	Clear routes, defined roles
E2 · Configuration	Defining the folder structure, nomenclatures, metadata categories, roles and access rights.	A system aligned with the organization
E3 · Document import	Taking over existing documents (for example PDF, XML) and assigning retrieval metadata.	A single, searchable archive
E4 · Workflow modeling	The administrator predefines the approval workflows, phases and owners.	Digital, paper-free routes
E5 · Training	Hands-on training for users and application administrators.	Autonomous users in a short time
E6 · Support and integration	Usage assistance and, if needed, integration with other solutions or systems through web services.	Operational continuity

No limit on the number of users

The application is web-based, installed on a server and requires no installation on users' workstations.

MOBIUS
THE RISK MANAGEMENT COMPANY

LET'S START NOW

Organized documents. Workflows under control.

We accompany you through every step of the implementation — from analyzing document routes to the day-to-day use of the application.

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