

Process and workflow automation: documents route and file themselves

With documents in the cloud, working for you through document and content management, you're ready to unlock maximum business impact through process and workflow automation.

Rubex Workflows can be customized to automatically move documents through recurring processes. Workflow logic can branch in user inputs, like approval/rejection input from users, as well as other variables.

Common workflows send documents to a specific user for approval or rejection. Depending on their input, the document will then be sent to another location or another action will be performed such as file requests or setting retention. Documents with certain profile information can be sent down other branches of the workflow.

Automated workflows

Review snapshots of ongoing workflows for an in-depth look at how your processes play out across your business and see where improvements can be made.

Smart automation

Automatically recognize, intelligently organize, name, and properly file documents using information contained in the files themselves.

Zonal OCR

With the metadata captured from your documents, Zonal OCR has the capability to automatically route your documents to the correct location in your document management system. When paired with Rubex's folder template feature, the system can automatically create new folders for those documents.



Integrations to leverage your existing technology investments

Rubex integrates with popular email services to automatically import email messages and attachments into your system.

Security, compliance and governance: Automatic protections for your business as you grow

Digitize, manage, share, and automate documents with total peace of mind thanks to a convenient, yet secured sharing function. Rubex security features are fully customizable with plenty of safeguards.

Role-based permissions

Role-based permissions ensure only authorized users can access secured documents.. Admins can give designated groups of users access to sections of the system automatically, without heavy lifting from IT. Permissions assist with compliance in the event of an external audit.

Retention

Rubex can easily be configured to delete documents after specific periods of time. This simple feature improves storage, reduces liability, and makes it easier to find what you're looking for. This is a particularly useful feature for human resources managers and accountants that are responsible for retention.

Governance

Rubex allows you to set governance for individual documents as well as entire folders, drawers, and cabinets. Use these tools to ensure that specified documents, folders, or drawers are locked down and protected from tampering or deletion. The system also provides auditing logs to prove files have been tamper-proof.

Ready to learn how to transform the way you do business for the better? Let's talk about how to reimagine your work day with Rubex.

