

rubex[™] by eFileCabinet

Document Management and Automation to Drive Business Growth

Rubex is the all-in-one document management and process automation solution that powers business growth by digitizing, automating, and securing documents. Automated workflows enable business users to spend less time on paperwork and processes, and more time on the work that matters and drives growth.

Simplicity: Built for users, welcomed by IT

Rubex was designed to be set up and used daily by business users, without the need for heavy IT involvement. Thousands of businesses across every industry use Rubex every day to improve customer experience, automate work, and grow revenue.

Every aspect of Rubex is designed to make your work processes more efficient. Automation is central to Rubex, and making automation intuitive for users of any skill level makes it the most accessible workflow engine available. Users can easily automate a document's entire lifecycle, starting from upload, to approval, to archiving, and finally to post-retention deletion.

Document management: put your content to work for you (not vice versa)

Transforming work for your teams and powering revenue growth takes more than digitizing your documents to the cloud. That's why Rubex includes powerful yet easy to use document management features.

Templates

Create templates for folder structures you want standardized throughout your system. Create a list of predefined document names that you can quickly apply to files uploaded to your drawer. Templates are your way of only having to do the work once. .

Missing item search

Run a check on folders or drawers for items that are missing, so you can know what work still needs to be completed. Results will show what folders or drawers created with that template do not contain the requested item. It can also be used to search for other modifiers including comments, profile data, and more.

eSignature with KBA & OTP

Send secure signature requests to anyone inside or outside your company for any document in your system. Save and secure your signed documents anywhere in your system along with a separate, indelible audit trail document, making it one of the safe and compliant forms of electronic signature. Add additional signer authentication options with knowledge-based authentication (KBA) or one-time passcode (OTP).

*eSignature envelopes sold separately

Forms

Design and create your own fillable forms with your PDFs, directly from Rubex. Send to clients and colleagues to fill out, eliminating manual data entry. Directly tie information input into document profiles as metadata, and use this form fill data to trigger automated workflows.

Cloud storage: a central location for all of your documents

Intelligent organization means that you will never lose key business documents again because all of your files are at your fingertips, and accessible when you need them. Advanced cloud storage is powered by simple-to-use features including:

- Full-text search
- Folder templates and predefined file names
- Portfolios for your most used documents

Collaboration: a secure file-sharing solution

In today's modern businesses, documents and workflows are collaborative with participants distributed around the country or the world. Secure sharing is another central feature to Rubex.

Smart, Secure Sharing

Share files directly from the interface, giving guest access for recipients to download files over a secure connection. Set the recipient's permissions, file/folder expiration, and the notifications you want to receive regarding the shared files.

File Requests

Send file requests to clients and other outside parties, granting them guest access to automatically rename and upload specific files directly to a folder you choose.

Access Links/Instant Sign-In

When you need to give faster and easier access to clients or coworkers, create direct links that will give them immediate access to files and folders. Either send a link directly to their email or generate a URL to share over other text or instant messengers.







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.