

EDRMS

Electronic Document & Records Management

**Control the record. Find the truth.
Prove every action.**

A secure, configurable platform for the complete information lifecycle.

WHY CHANGE

Information grows faster than control.

Shared drives and email can store files. They do not create a reliable record of what happened, who acted, or when information may be disposed.



Scattered

Records live across inboxes, drives, scans and line-of-business systems.



Hard to prove

Version history, approvals and custody are fragmented or informal.



Risky to retain

Legal holds and disposition depend on spreadsheets and memory.



Slow to find

Metadata, OCR content and departmental context are rarely searchable together.

ONE GOVERNED WORKSPACE

Capture once. Control the full lifecycle.

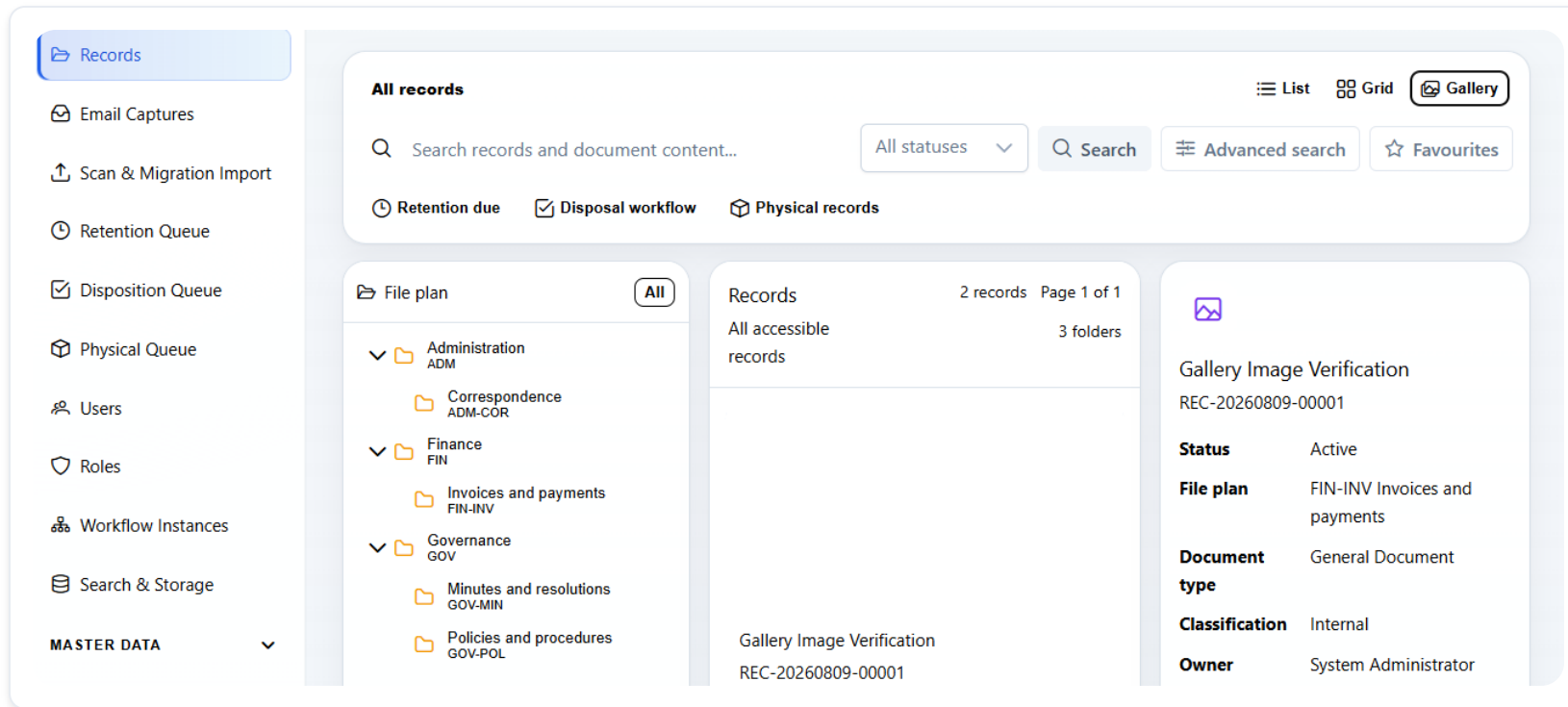
EDRMS connects everyday document work to classification, access, retention, collaboration and audit—without making the user experience feel like a compliance system.

- Familiar records explorer
- Configurable governance
- Secure automation and integration



Familiar for users. Structured for records teams.

A File Explorer model puts governed information within reach.



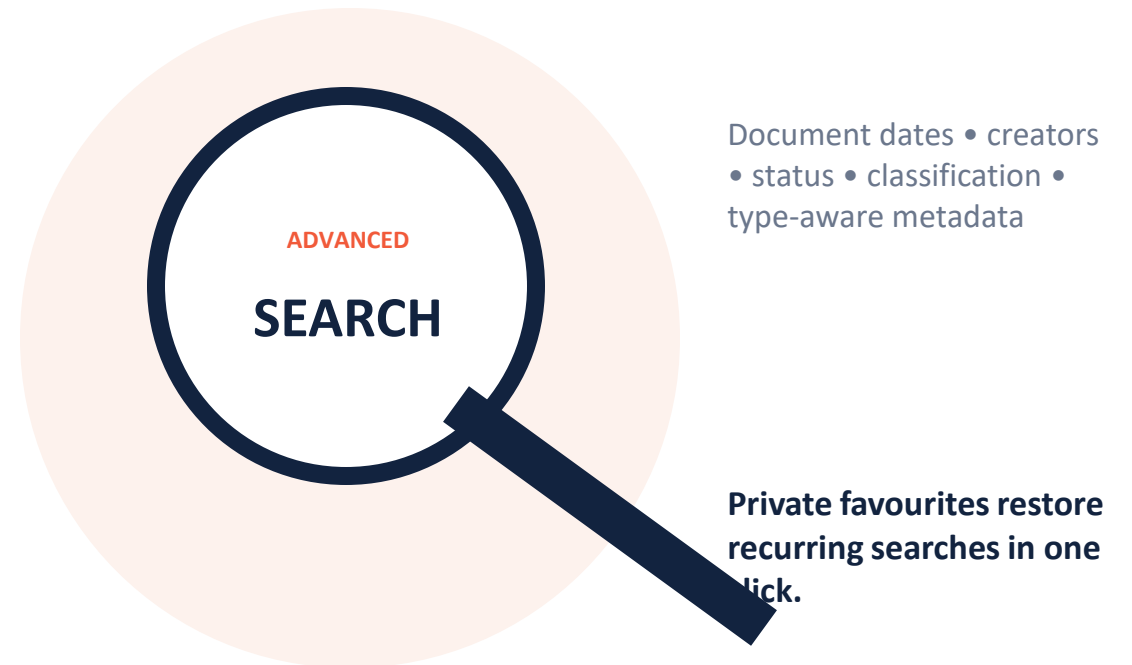
One screen brings together

- Hierarchical file plan
- List, grid and gallery views
- Image and PDF previews
- Paged results and detail panel
- Role-aware actions

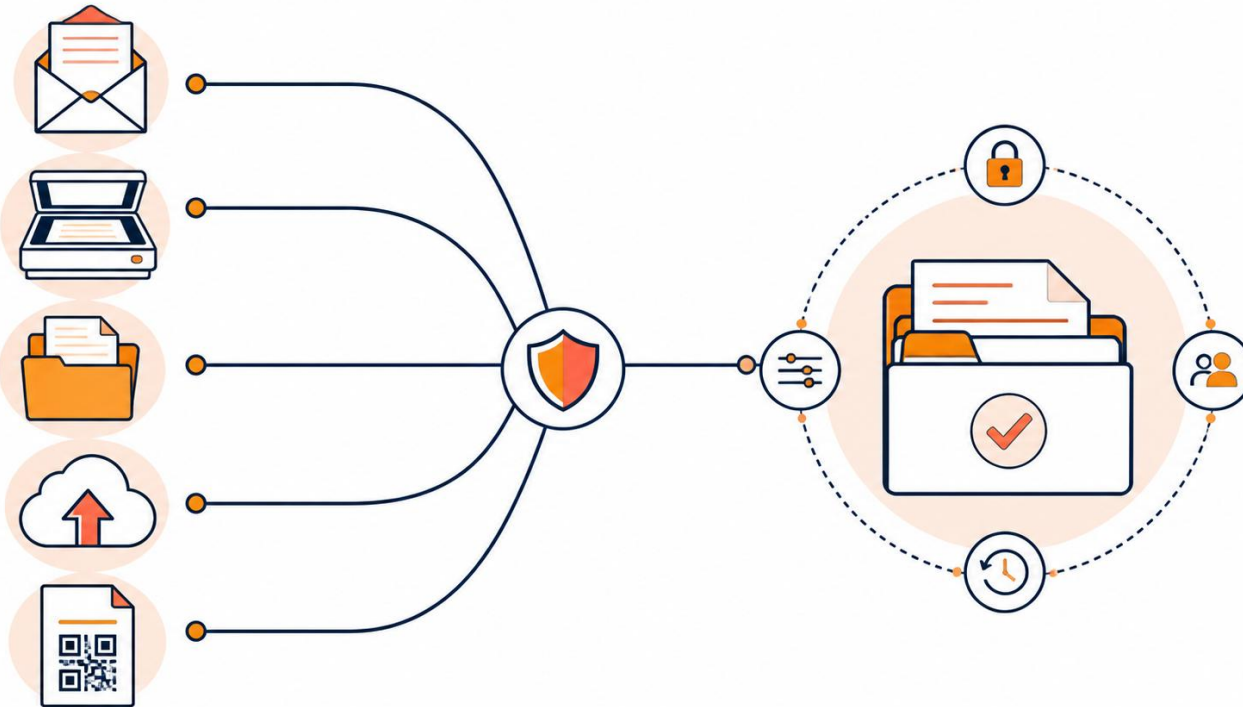
Find the right record—even with only part of the story.

Search across

- **Record numbers and titles**
- Tags and file-plan labels
- Structured metadata
- OCR and extracted content



Capture information from the channels people already use.



MULTIPLE PATHS. ONE CONTROLLED OUTCOME.

- Drag-and-drop and resumable uploads
- IMAP and Microsoft 365 mailboxes
- Scanner batches and bulk migration
- Watch folders and capture sources
- QR, blank-page and fixed-page separation

GOVERNANCE BY DESIGN

The file plan drives the rules—not individual memory.

The primary file plan controls classification, access, retention, disposition and workflow triggers. Secondary placements improve discovery without creating duplicate records or competing governance.

- Retention and disposition queues
- Legal holds and independent approval
- Evidence-backed certificates and audit



Collaboration stays useful—without weakening control.



Work together around the record

- Comments, mentions and live updates
- Related records that never grant access
- Passworded, expiring share links
- Ordered bundles with latest versions

Every collaboration path remains scoped, permission-aware and auditable.

Use the simplest approval path that fits the work.

SIMPLE IN-APP SIGNING

Parallel signatures without a workflow.

- Secure invitation and email OTP
- Typed, drawn or uploaded signatures
- One final signed canonical version

ADVANCED WORKFLOW

Conditional, multi-step and integrated.

- Elsa 2 compatibility and Elsa 3 focus
- File-plan event triggers
- Activities for records, versions and lifecycle

ONE RECORD. TWO FACETS.

Connect the electronic file to its physical original.

Track where it is, who has it and when it is due back—using the same governed record.

01 Register

Unique barcode and hierarchical repository location.

02 Circulate

Check out, return or transfer with due dates and notes.

03 Prove

Append-only custody history and overdue operational queue.

Records become visible work—not forgotten dates.



01

TASKS

Schedule recurring work on a file-plan node and assign it to people or roles.



02

CALENDAR

Bring together tasks, retention, disposition, signing and physical due dates.



03

NOTIFICATIONS

Keep assignment, mention, bundle and deadline activity visible in-app and by email.

CONTROL THAT FOLLOWS THE RECORD

The right person. The right action. The right information

Feature permissions and file-plan access are evaluated together on every protected action.

- Local identity, TOTP and Entra SSO
- Rotating sessions and revocable API keys
- Audit history and scoped public access



Shape the platform around your organisation.

Configure without rebuilding

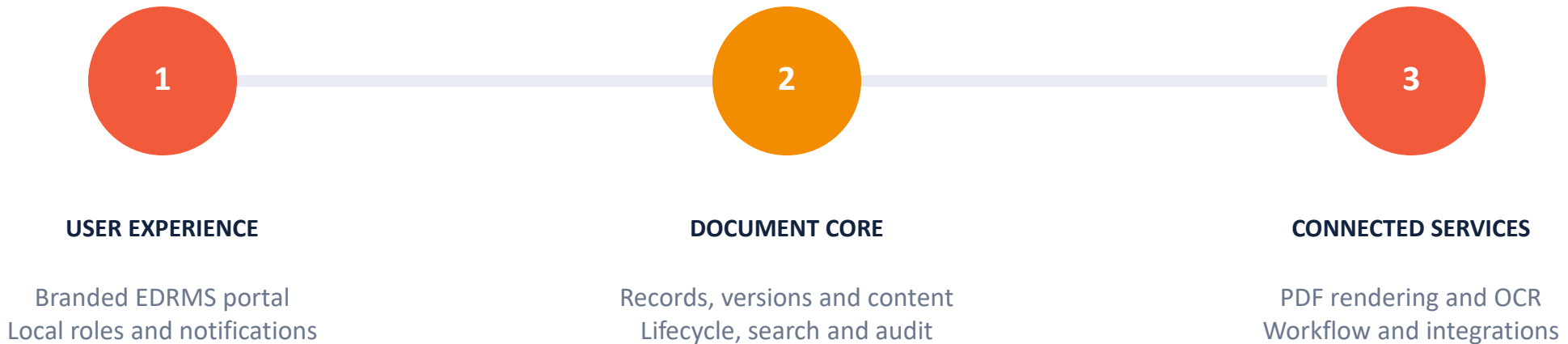
The system separates stable records-management rules from organisation-specific master data, branding and integrations.

White-labelled

Logo, favicon, login background, colour and application name.

- Branding and custom CSS
- Roles and access
- File plans and retention
- Mailboxes and capture sources
- Document types and metadata
- Notifications and signing
- PDF templates
- Workflow integrations

Built for controlled growth and operational visibility.



Search generations • storage quota • upload reservations • retryable background processing

DOCUMENT-INTENSIVE ORGANISATIONS

Different sectors. The same need for reliable records.

- | | | |
|----|------------------------------------|--|
| 01 | LEGAL & PROFESSIONAL | Matter files, evidence, correspondence, signing and secure client packs. |
| 02 | CONSTRUCTION & PROJECTS | Guarantees, contracts, drawings, approvals, compliance and handover packs. |
| 03 | PUBLIC & REGULATED | File plans, retention schedules, legal holds, disposal and auditable access. |
| 04 | CORPORATE OPERATIONS | Policies, finance, HR, governance, board packs and recurring records work. |

SEE IT IN YOUR CONTEXT

Bring one real process. We will show the full record journey.

A tailored demonstration can use your terminology, file-plan structure, metadata, access model and approval scenario.

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