

Intelysys eFileRoom

Today, tax departments are under intense pressure to mitigate risk, avoid material weaknesses and improve controls. With new compliance regulation and growing business complexity, information and data needs to be securely captured and shared across the teams. The need of extensive documentation and transparency across all tax processes is increasing and document management tool can be a powerful solution to all the business problems.

eFileRoom addresses the heightened challenges created by today's changing tax environment. It eases digital asset management and is built on multi-tier distributed architecture that makes it scalable from single department to globally dispersed enterprise. Content can be classified, tagged, captured, stored and re use in a single environment with the help of eFileRoom. The forte of our solutions is to enable you to create, store, setup taxonomy, version, distribute, and control digital assets and information that enlarges the productivity of distributed teams and results in coherent tax processes to avoid Risk and Material weaknesses

eFileRoom Benefits

Easy to Use

Intelysys eFileRoom application provides all the critical components of document management in one easy-to-use intuitive interface accessible through any web browser. It enables tax department to safely access, manage, and share content anytime anywhere.

Reduces Cost

eFileRoom reduces overall cost by automating all your document management with in your tax department. It increases efficiency and accuracy; as a result tax professional can focus on more valuable activities such as tax planning. eFileRoom does not require any client installation, as anyone can access the functionality through a web enabled workspace. eFileRoom messaging feature also eliminates the email file attachments significantly reducing the burden on email servers while improving security and compliance. eFileRoom delivers maximum flexibility with lower cost of ownership.

Facilitates Collaboration and Share Information

Intelysys eFileRoom has a simplified model for document sharing and collaboration. Users can share, modify and view tax documents all through an intuitive interface accessible through any web browser. It enhances coordination between tax teams and intercompany departments. Team members in the tax department can work on multiple projects at the same time. eFileRoom provides document level security so that tax department can even safely share the content with any customers and partners outside of an organization.

Improves Controls for SOX Compliance

With Intelysys eFileRoom, organizations can effectively address growing compliance requirements. All the users' access in eFileRoom is identified tracked and are based on role types. eFileRoom record every user making changes in the tax files with the Check in and checkout capabilities. With the version control capabilities every version of the document is saved online in eFileRoom. It provides complete document approval cycle. All the reports are exportable to excel.

Streamline and Automates Tax Process :

eFileRoom help Tax department streamline their processes and improve document management by converting from paper processes to electronic automated processes. It provides a complete automated document life cycle including how documents are prepared, reviewed, and approved; where they are stored; and how they are ultimately disposed off and retained. It provides a central repository to store all tax related documents and files and organize them in a logical way. Classified taxonomy helps improve content discoverability and reuse, which is an essential tools for compliance and critical for team efficiency.

Intuitive Document Search Options:

eFileRoom provides search option on every step for the user to find a document. Users can search by keywords or file name at the Dashboard or anywhere inside a project. Searches can be performed on the metadata as well.

Powerful Workflow Engine:

eFileRoom takes tax department well beyond basic routing and approval. The embedded logic in eFileRoom allow tax department to automate more complex tax processes. Email notification and support for automated classification and categorization of documents improves process communication and accelerates process completion. Shared Library also helps automate access management. Version control of document and access log increase content security and maintain audit trails.

eFileRoom Features

Classification of Taxonomy:

eFileRoom provides classification of taxonomy that helps improve content discoverability, content reuse and in return enhances team productivity. Content, collaboration and context can be captured and stored in a single environment for classification, categorization and re-use. Classification helps organizations to index documents and records in a standardized manner for more effective discovery and improved compliance. eFileRoom categorize every document that is uploaded. It allows Tax department to dictate their own standard classification and as many as they want. Custom report of all the classified documents can be generated and can be export to excel.

Notification and Alerts

At every step of a document management email notifications are generated through the eFileRoom application informing user as soon as they are assigned to a project. Every team member who is participating will be notified by eFileRoom about change in status of the document. Reminders can be created to keep the team members on target.

Link emails to your projects

eFileRoom gives an ability to link e-mails to a project by virtue of which team member can easily manage all their e-mail linking important messages to their project or file. Documents can be sent directly to the project through the email.

Shared Library

eFileRoom provides a module to share the documents across different projects which eliminates the need to reload the same documents. Thus increase the effectiveness and efficiency of operations and reduces the material weaknesses.

Multiple file uploading

eFileRoom allows multiple file uploading functionality. Documents can be uploaded in any format instantly.

Maintains Audit trail and Life of Projects

eFileRoom monitor user's login history with name and site access time and date as well as it manages a life of a project by making a project Active, In-Active and Archived.

Dashboards to Simplify Processes

eFileRoom provides project dashboard as well as individual dashboard that give transparency and visibility to all tax process.

Project Dashboard: The dashboard is designed to give administrators transparency and visibility of all the tax projects and processes. It allows users to view the status of project with statistics along with graphical illustrations. The dashboard brings administrators transparency and visibility to all the documents and their status.

Personal Dashboard: eFileRoom gives you an ability to create custom personalized dashboard through the use of web parts. It gives user complete control of the information that he wants to view. It is personalized summary of an individual work. Team member can view all the documents which are due today, past due and overdue; documents, its statuses along with name of the project that it is assigned to. Any quick links can be created to make it personal or to move between other applications.

Highly Adaptable Environment

eFileRoom has a user friendly interface. It gives a user flexibility to use the eFileRoom according to the need of a particular project. The team member can have access to eFileRoom according to their role type. All the Users can be given rights to accesses or work on certain documents. For example an "administrator" might upload the document and assign rights to the "Internal User" as a "Preparer" or a "Reviewer". "Read only" right can be assigned to the "External user" only to view the documents. An Internal who could have an "Approver" or a "Reviewer" rights can work on a document, change the status and drive it to the completion. An "Approver" can finally close or "sign off" the documents.

Intuitive Documents Lifecycle Management

It begins with document approval lifecycle in which documents can be assigned to the participants of the project. All the documents can be assigned statuses. As the document reaches to the completion it status changes from assigned, prepared, reviewed and completed.

Every time the document is modified or changed, eFileRoom locks the version and keeps records. Personal Dashboards of a user and a Project dashboard will display all the documents and the statuses keeping all the users informed.

At the time of uploading the documents are classified according to the standard taxonomy. All the categorized documents can be viewed in eFileRoom and any report can be export to excel.