



Comprehensive Enterprise Content Management Solution to Support Your Remote Office Work

Supported by the Innovation and Technology Fund

OceanX ECM: ITF SERAP - E/P047/14, OceanX BPM: ITF ESS - B/E033/16

Introduction to OceanX



- Vision: **To be the world's leading Enterprise Information Management and Delivery solution provider**
- Mission: **Develop world-class solution for local markets**
- Established in 2005
- Headquartered in Hong Kong, Branches in China, Malaysia and Canada
- Business: Software R&D
- Serving over **70%** of Hong Kong top 500 enterprise including government and public utilities
- Target at global markets
- Strong reseller network
 - Mainland China, Hong Kong, Macau & Taiwan, India, Sri Lanka, Bhutan, Malaysia, Singapore, Philippines, Thailand, Indonesia, United States, Canada, UK, Netherlands, Middle East (Israel, Iran, Egypt, Saudi Arabia, Dubai, UAE), Caribbean Countries, South Africa, Mauritius, Nigeria, Australia

What is OceanX ECM?



- OceanX ECM is **new generation of Enterprise Content Management** software which supports both **cloud-based** and **on-premises**
- A **Comprehensive** ECM solution from Document Management System, Document Capture, WorkFlow, Document Share for different industries
- OceanX ECM use Python which supports cross platforms & multi-devices
- Support high availability
- Support by Innovation and Technology Fund:
OceanX ECM: ITF SERAP - E/P047/14, OceanX BPM: ITF ESS - B/E033/16
- OceanX ECM's product development concept comes from Bruce Lee and Tao Tee Ching (道德經)'s wordings – “The Philosophy of Water”



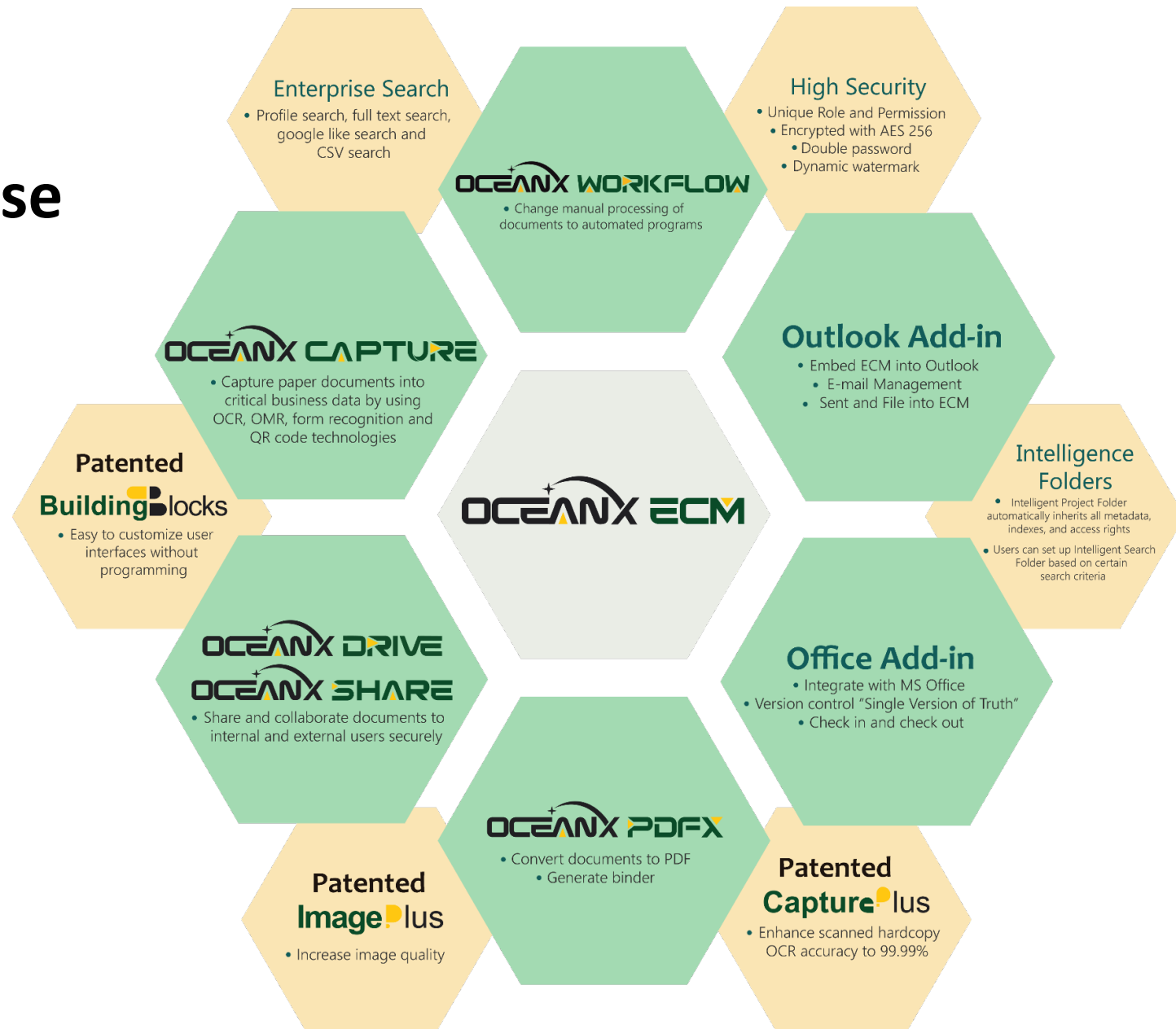
for Remote Work



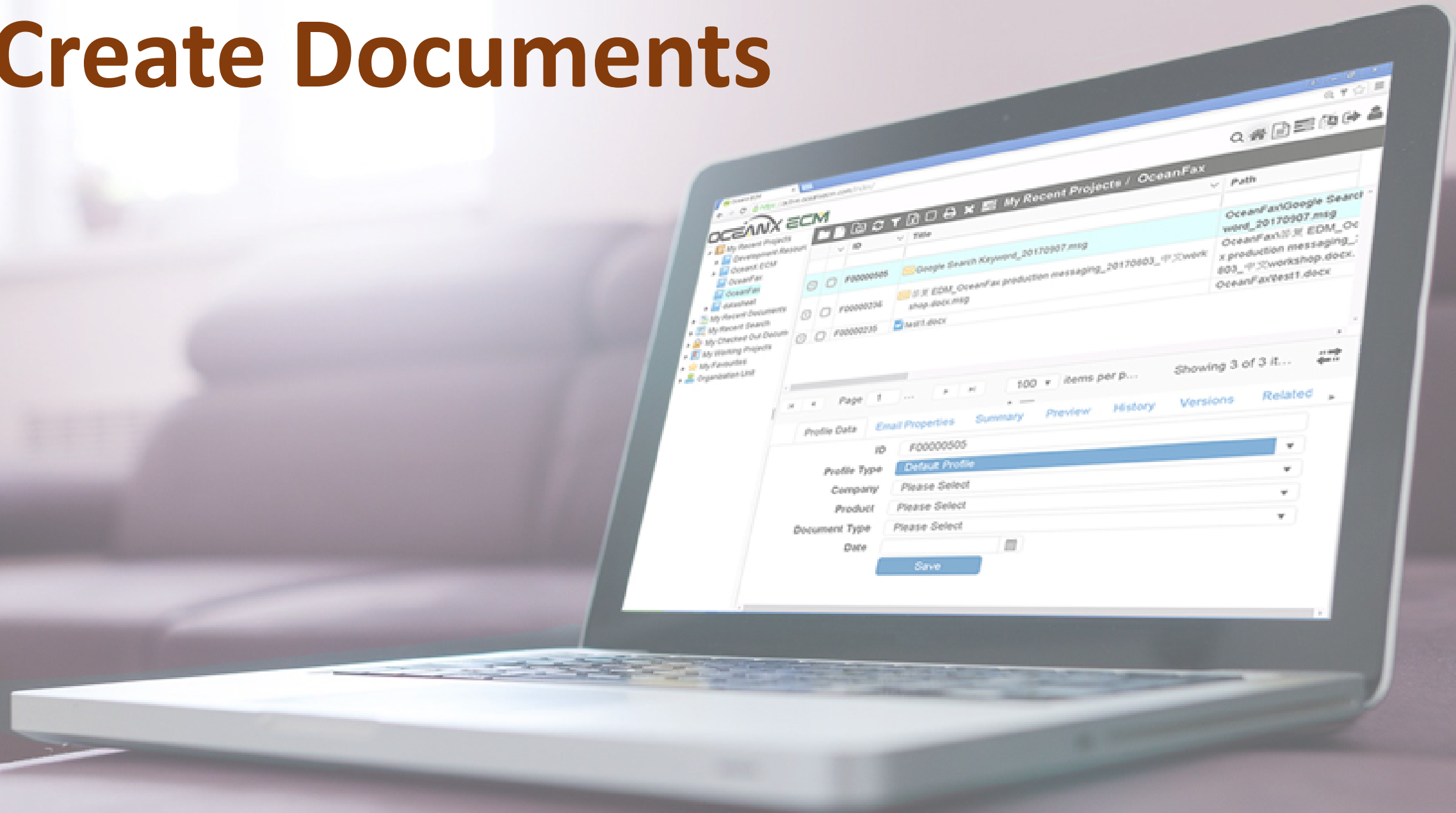
Hard copy and soft copy documents or emails scatter from different sources and locations are difficult for remote work



OceanX ECM is a comprehensive Enterprise Content Management system which supports remote work

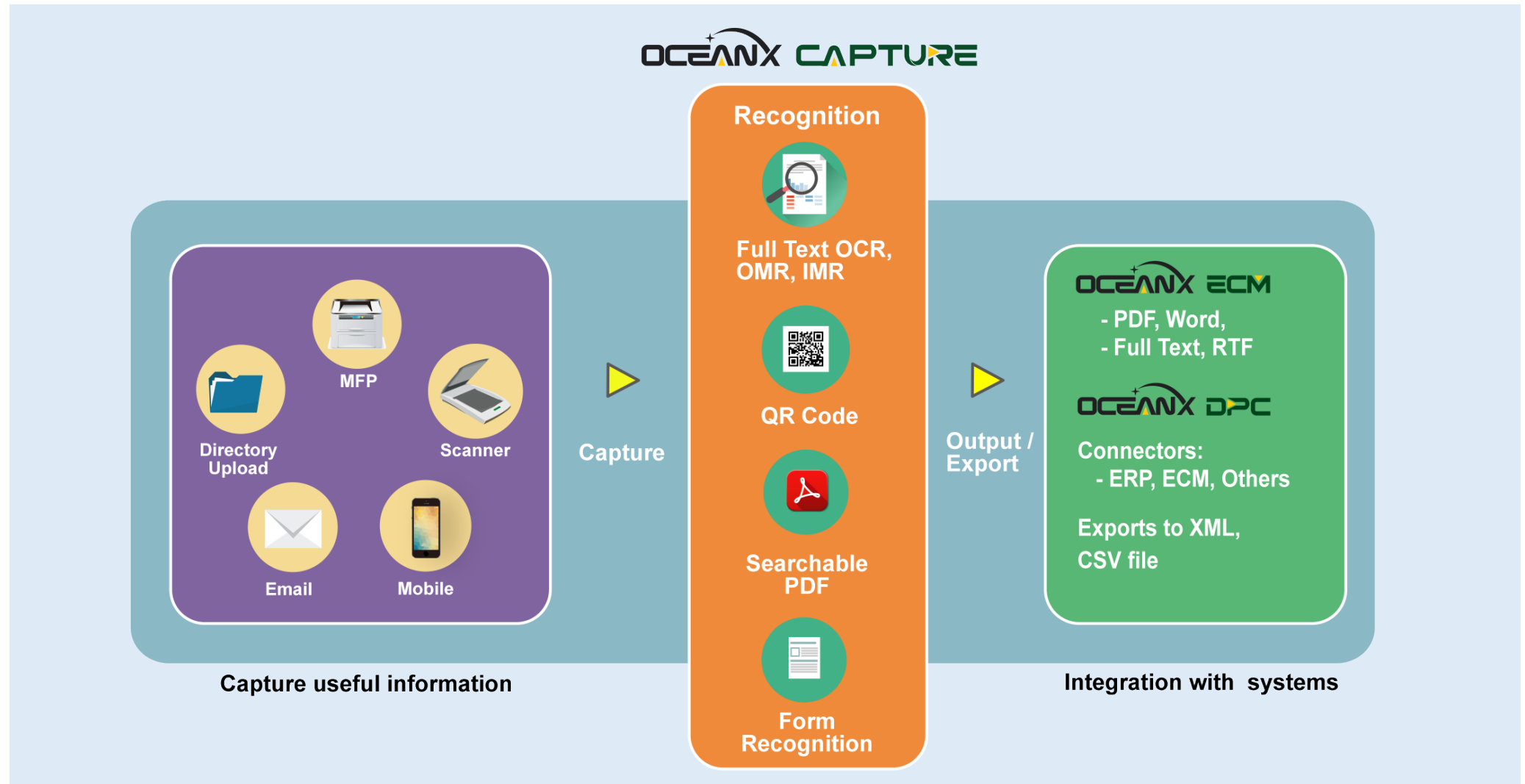


Create Documents



OCEANX CAPTURE

- **OceanX CAPTURE** is a powerful business application that can automatically convert paper documents to softcopy and input to ECM



Patented **CapturePlus** Technology

- **CapturePlus** is OceanX's innovative image enhancement technology that removes scanned document background noise and enhances image quality. With CapturePlus technology, OceanX Capture increases OCR accuracy rate and reduces manual indexing.



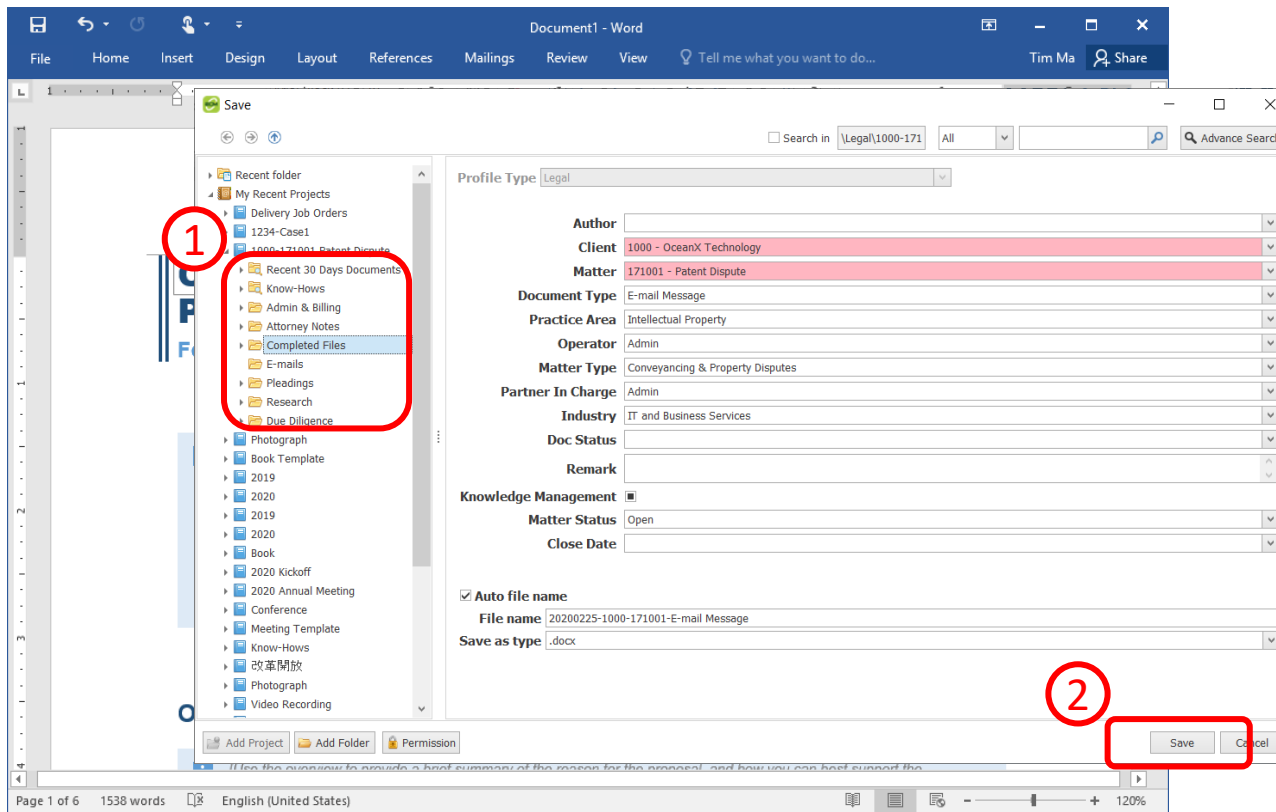
Office Add-in



- Enables users 'save' and 'save as' documents directly to ECM, provides Check in & Check out, Version control to protect 'Single Version of the Truth'
- Doesn't require users to spend extra time uploading and downloading documents

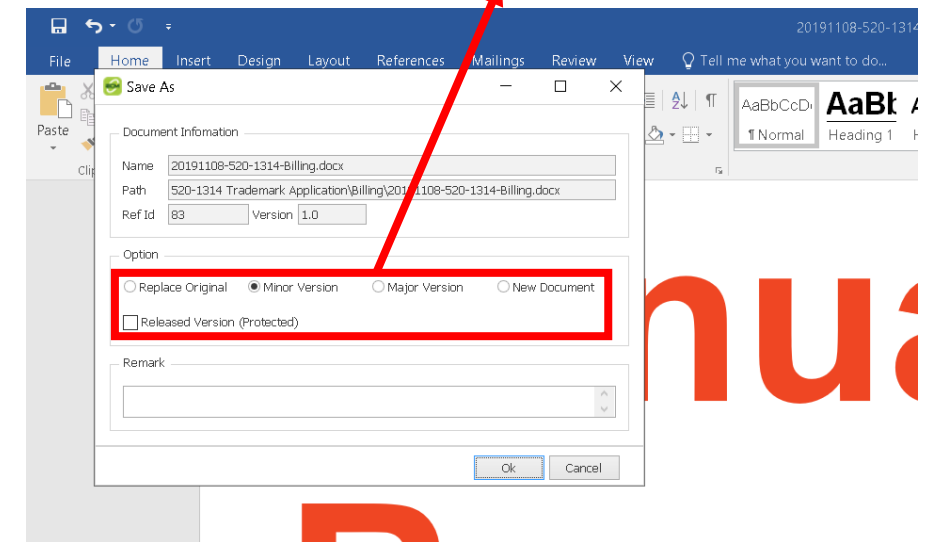


Save to ECM



Provide Version control to protect 'Single version of the Truth'

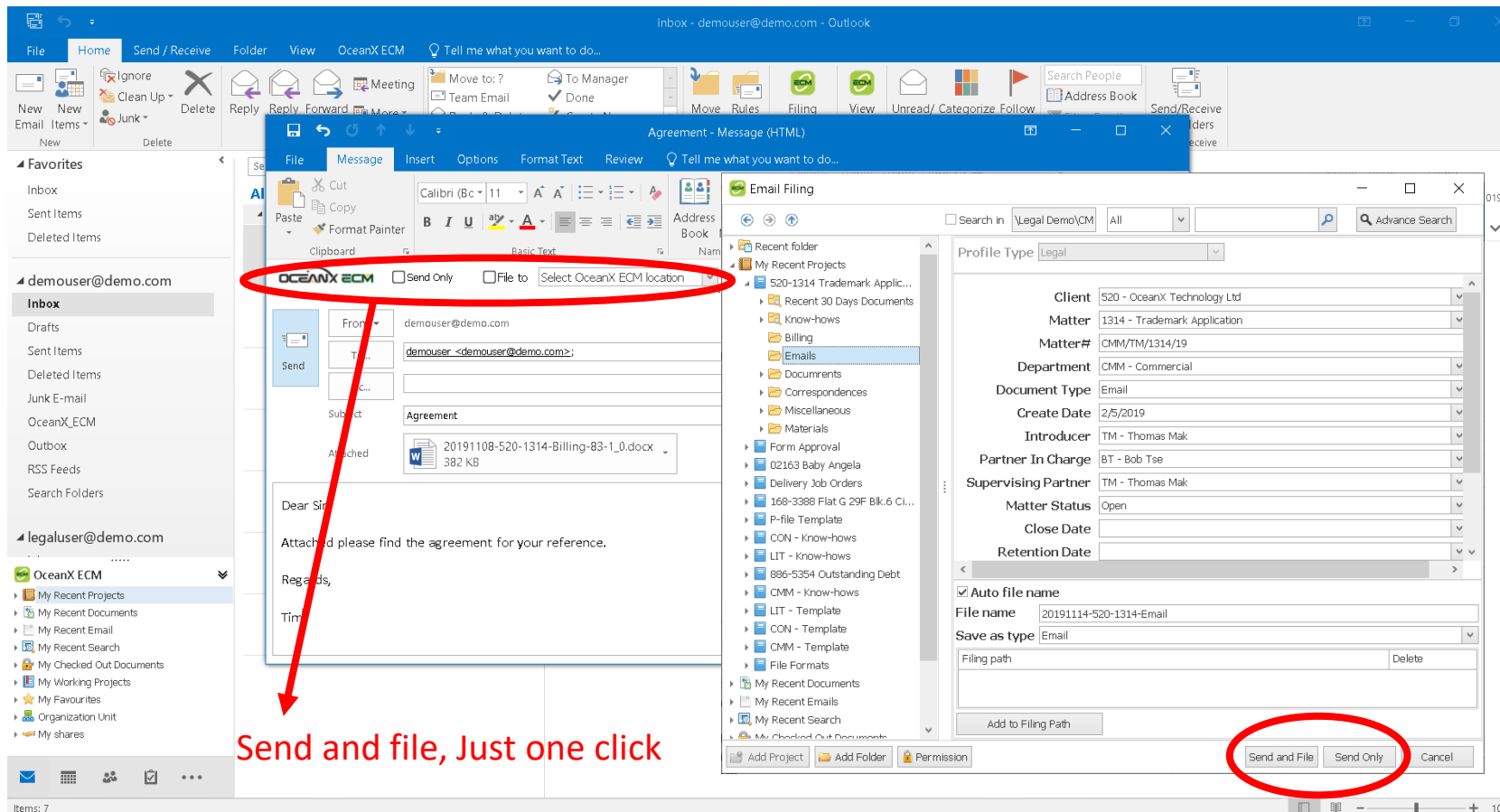
Version Control



Outlook Add-in



- Archive, store, organize and search e-mails in ECM
- Intelligent filing recommendations based on recent location, email recipient, subject, and attached document file names
- E-mail Tag will be added into the e-mail subject
- Replied email messages automatically archived to related e-mail folder



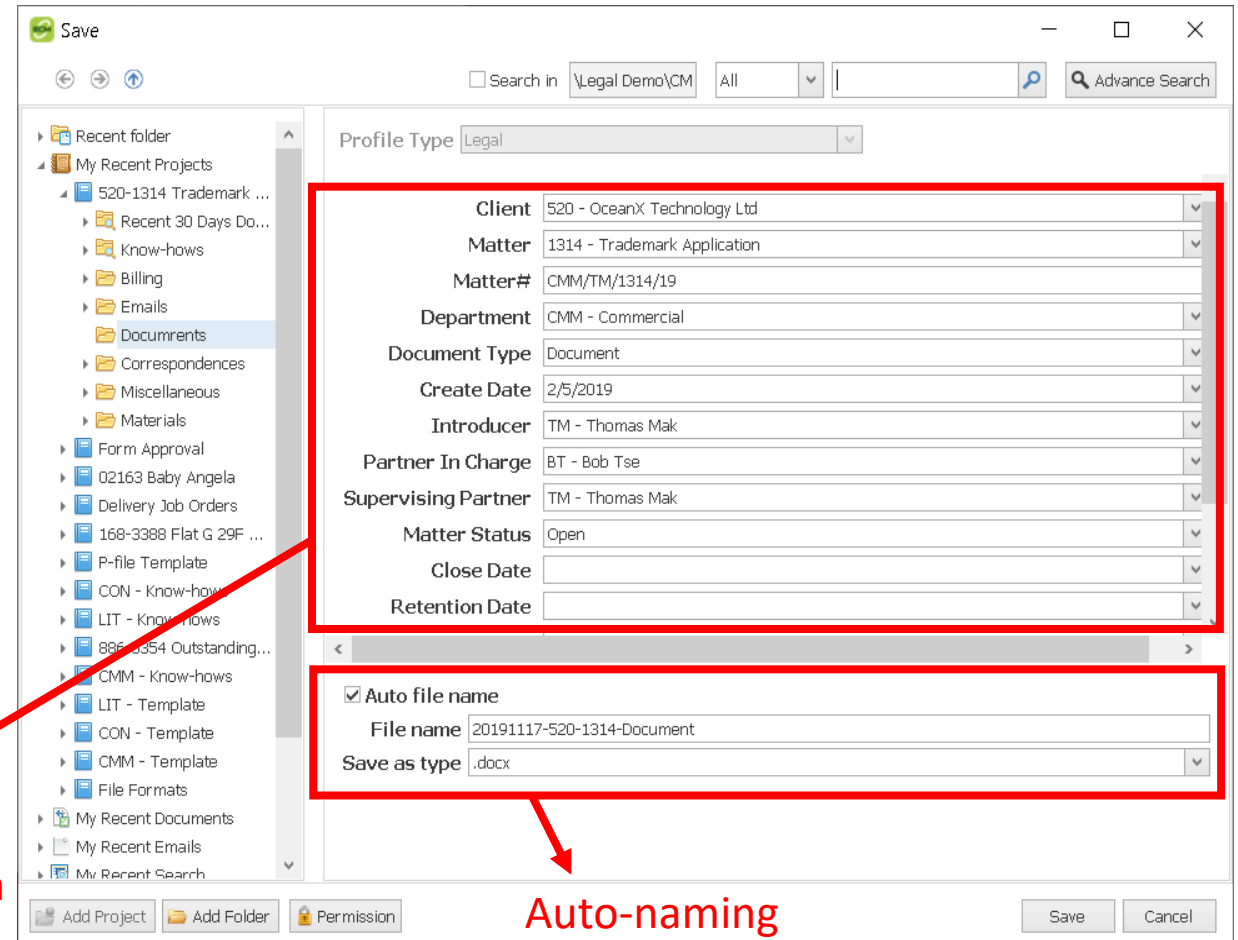
Intelligent Folder

- In OceanX ECM, Documents saved in a folder would **inherit** all the metadata, indexes and access right automatically



Intelligent project folder
is created automatically

Inherited project information
and permissions



Auto-naming

OceanX ECM consolidate emails, hard copy and soft copy documents into one system



- 520-1314 Trademark Application
 - Recent 30 Days Documents
 - Know-hows
 - Billing
 - Emails
 - Documrents
 - Correspondences
 - Miscellaneous
 - Materials

OCEANX CAPTURE

Scan



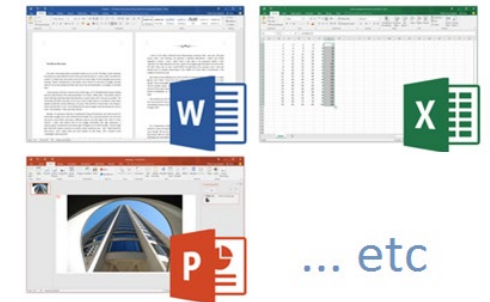
Hard Copies

Office Add-in

Save



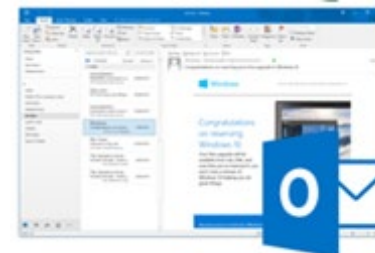
File Server



Other Soft Copy Documents

Outlook Add-in

Save



Emails

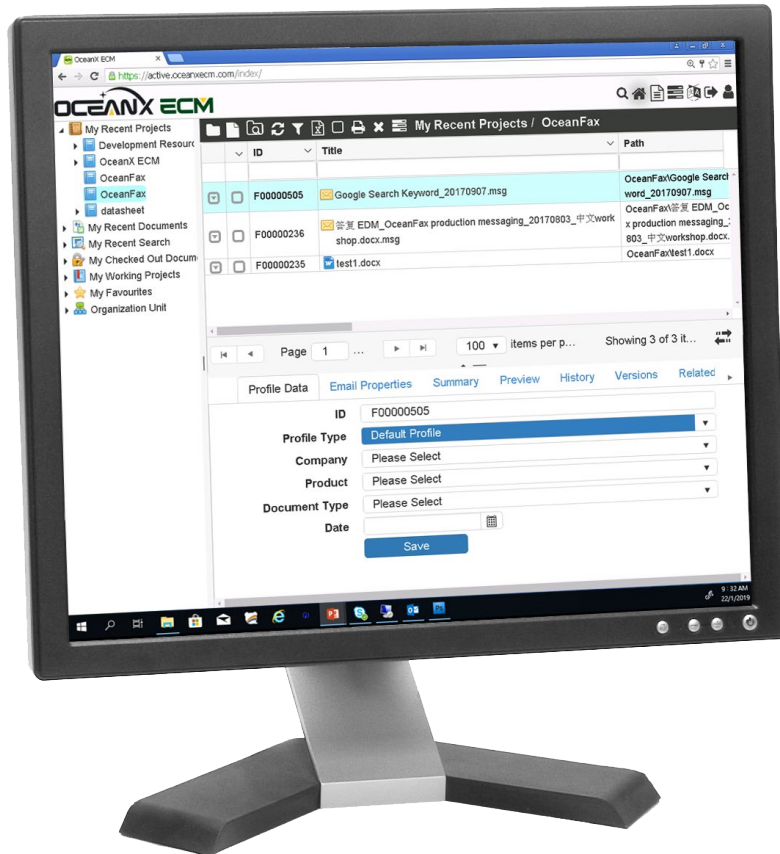
How OceanX ECM help Remote Work?



Responsive Web Interface



- Responsive web-based interface fits for all devices
- Users can **manage documents anywhere**



Patented BuildingBlocks Technology

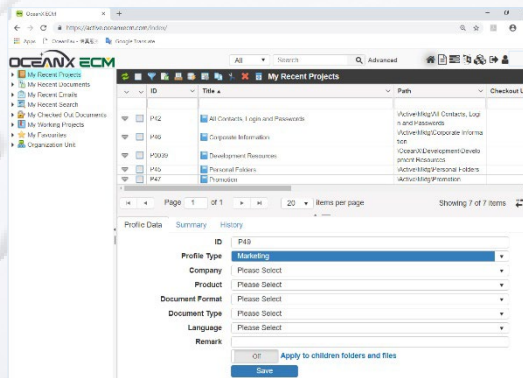


As flexible as water

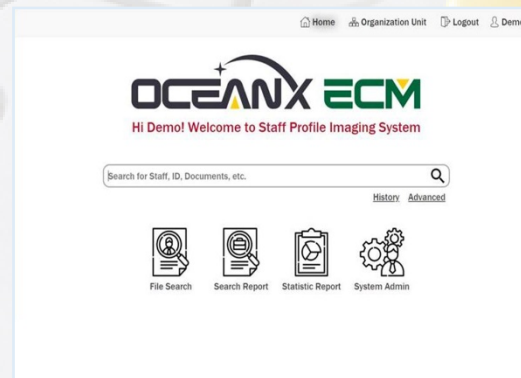
Personalized user interface and functions without programming by using OceanX ECM patented BuildingBlocks technology

“What user want is what user get.”

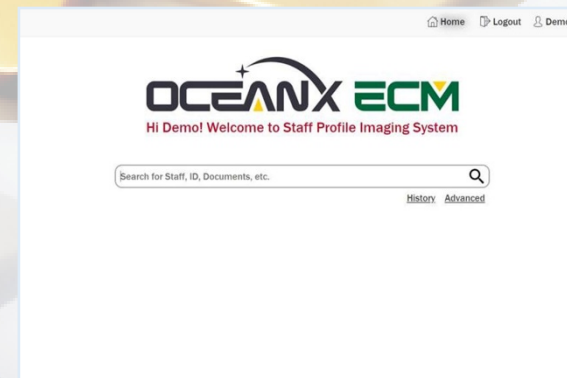
- Different client interfaces and functions available for different users or groups
- Increase user adoption rate and minimize the training time



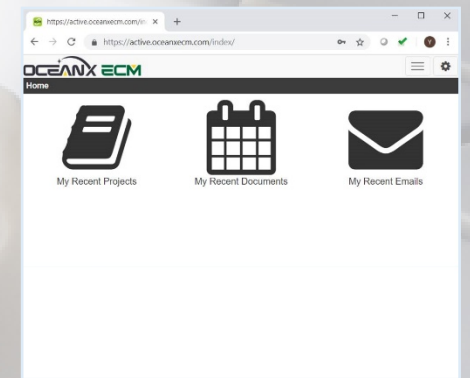
BuildingBlocks Powerful User Interface



BuildingBlocks Intuitive User Interface



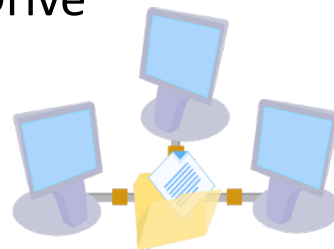
BuildingBlocks Simple User Interface



BuildingBlocks Mobile Phone User Interface

OCEANX DRIVE

- The Best Way to **Collaborate with Internal and External Users Securely**
- **Online editing of documents**
- **Co-editing of documents**
- **Control access to Drive**
 - Password Control to access Drive
 - User permission to Drive E.g. Print, Download, Upload, Edit and Delete
- **Drive History**
- **Sync with ECM Folder**
 - Drive can link up a Folder in ECM
 - ECM user can collaborate with external users through Drive
- **Sync with Local hard disk**
- **Email Notification**



OCEANX SHARE

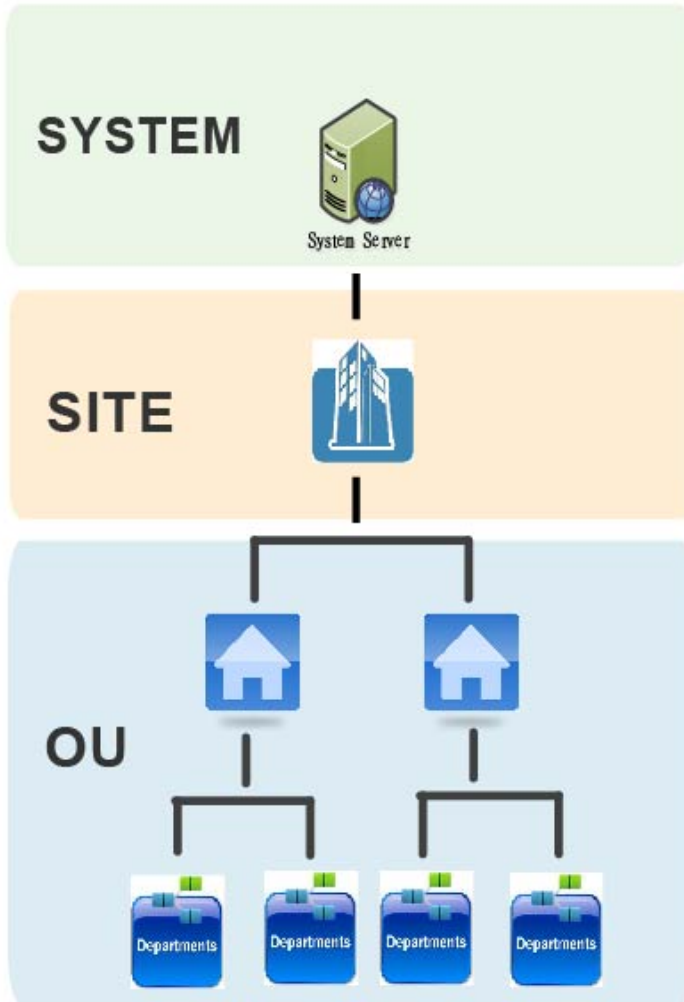
- The Best Way to **Share Documents to Internal and External Users Securely**
- **Control access to Share Documents**
 - Password Control
 - View, Print, Download Control
 - Expiry Date of the Share
 - Control how many times a shared document to be access
 - Add Watermark to Share Documents
- **Share History**
 - Allow user to know when and how a shared document is being access
- **Email Notification**



Other features



Unique Roles and Permissions Function



System Admin

- Manage OceanX cloud-based ECM platforms
- But cannot access the site and documents within it

Site Admin - Work as a company IT admin

- Can create and assign Organization Unit (OU), assign rights to OU admin for the administration features
- But cannot access to OUs or documents within it unless he is added to the OU by default

Organization Unit (OU) Admin - Work as a department admin

- Has full right to access to his/her own OU, sub-OU and documents within it

Sub-Organization Unit (OU) Admin - Work as a sub-department admin

- Has full right to access to his/her own OU, sub-OU and documents within it

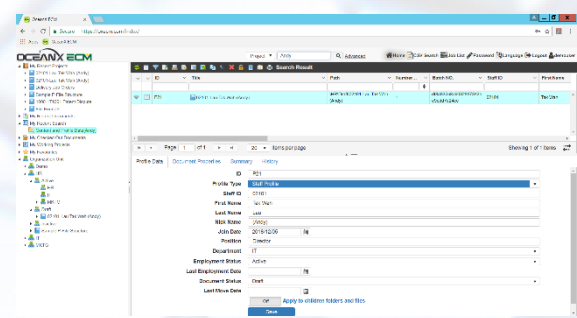
High Security Control



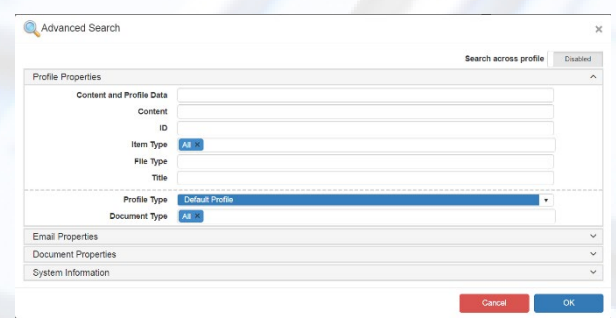
- **Encryption:** All documents stored in OceanX ECM are AES 256 encrypted and can only be accessed within OceanX ECM
- **Masking:** sensitive information in documents can be protected
- **Dynamic Watermark:** Dynamic watermarks can be generated based on user names, IP addresses, and date and timestamps, preventing the disclosure of confidential documents through screen capture or camera capture
- **Activity Log:** Log users' activity behavior and document activity in the system, enable someone to examine users' and documents' activities
- **Delete and Purge:** Users with deletion rights can delete documents in the ECM, but deleted documents will remain in OceanX ECM garbage bin until the authorized administrator purge the document
- **Password Policy & Double password:** Password Policy forces users to change password periodically. You can assign a Double Password to an important account to prevent single-person errors
- **Document History:** All document history are logged in ECM



Enterprise Search Function



search by metadata
(profile search)



search by document content
(full text search)



fuzzy search



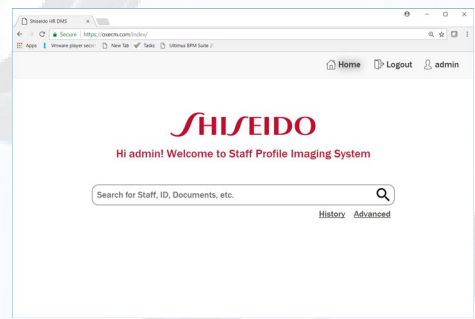
keyword search



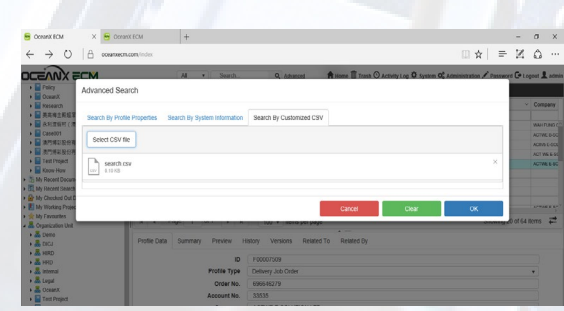
wildcard search



exact phase search



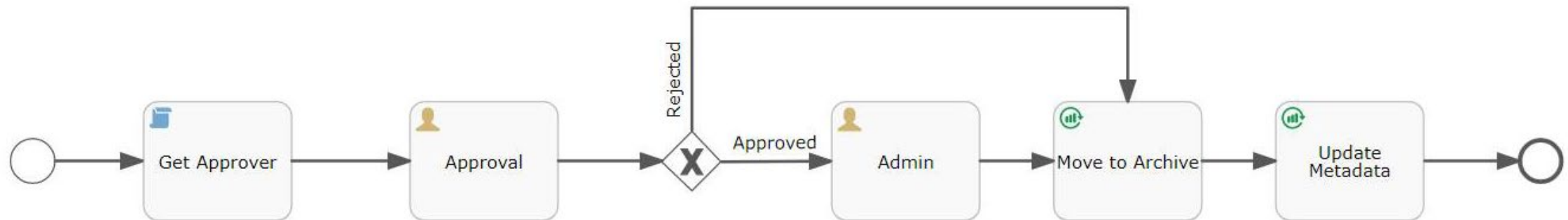
Google like search



CSV search

OCEANX WORKFLOW

- Automation of business processes that specify how content (documents, information, or tasks) is routed to another participant for review/approval
- Users are notified by e-mail what they have some content to review/approve
- Help to streamline the business process. Reduce time, reduce errors, and improve the quality of work
- Information about the task is readily available



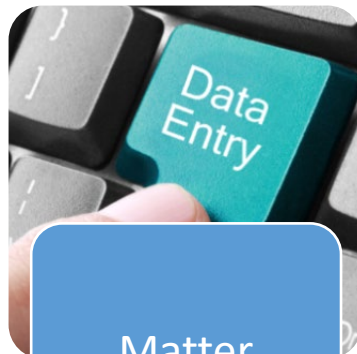
Flexible to apply for Different industries



Law Firm & Professional Service Corporate Legal & Compliance Department



- Matter Lifecycle in OceanX ECM



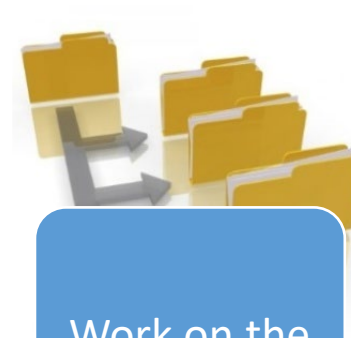
Matter
Opening

- Matter Opening In Practice Management Software
- Matter Opening In OceanX Legal Case Management



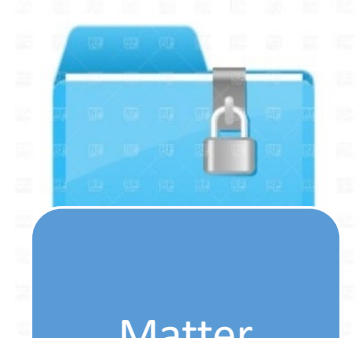
Automatic
Folder
Creation in
ECM

- Create the Matter Folder in ECM
- Assign the Matter Folder to users



Work on the
Matter

- Collaboration
- Email Filing
- Soft copies filing
- Hard copies filing

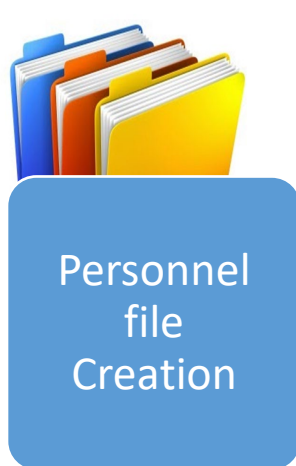


Matter
Closing

- Trigger some Processing Rules. e.g. Reset the access rights of the matter folders

Human Resources Management

- Staff Profile



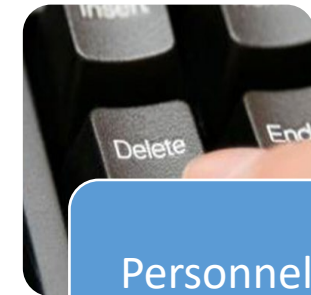
- Scan and Creation of Personnel files in ECM
- Assign Personnel files to Department Head access



- Update Personnel files metadata based on HRMS information
- Update Personnel files access (e.g. employment status, department or position changes)



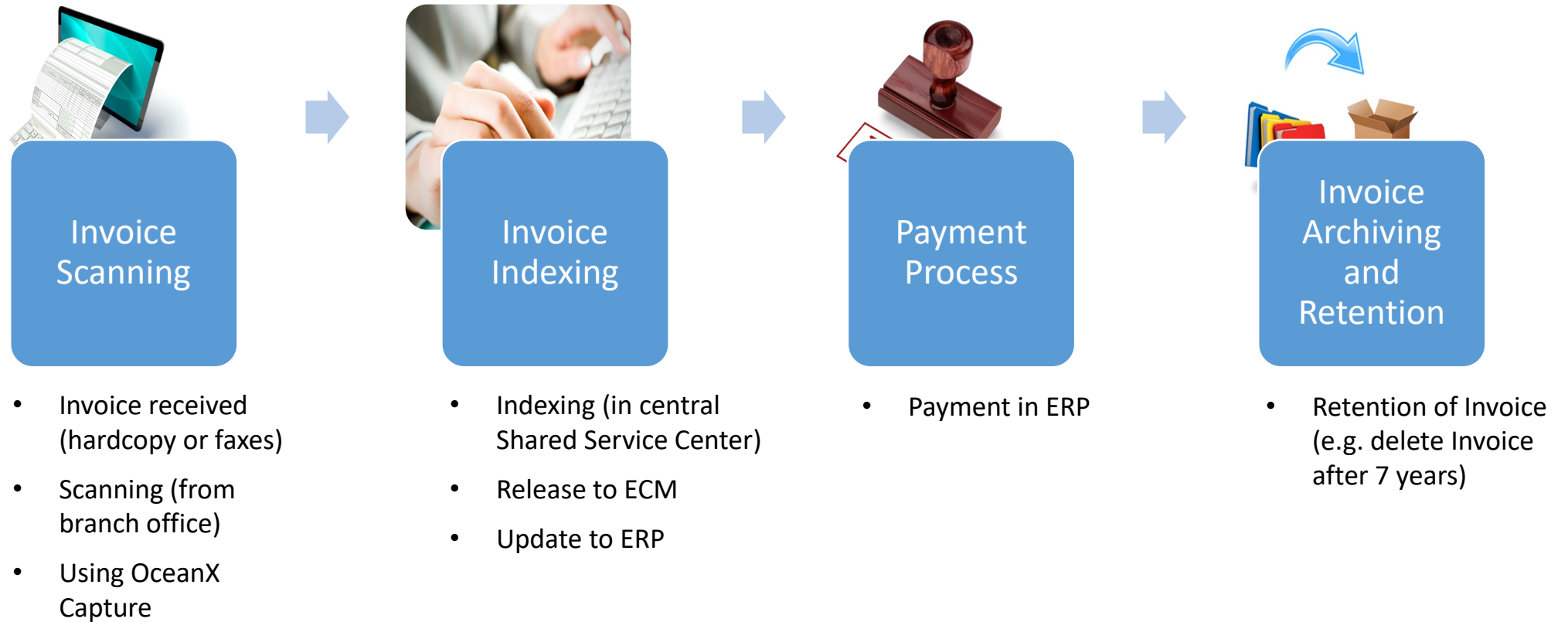
- Archiving of Personnel files for staff no longer working in the company



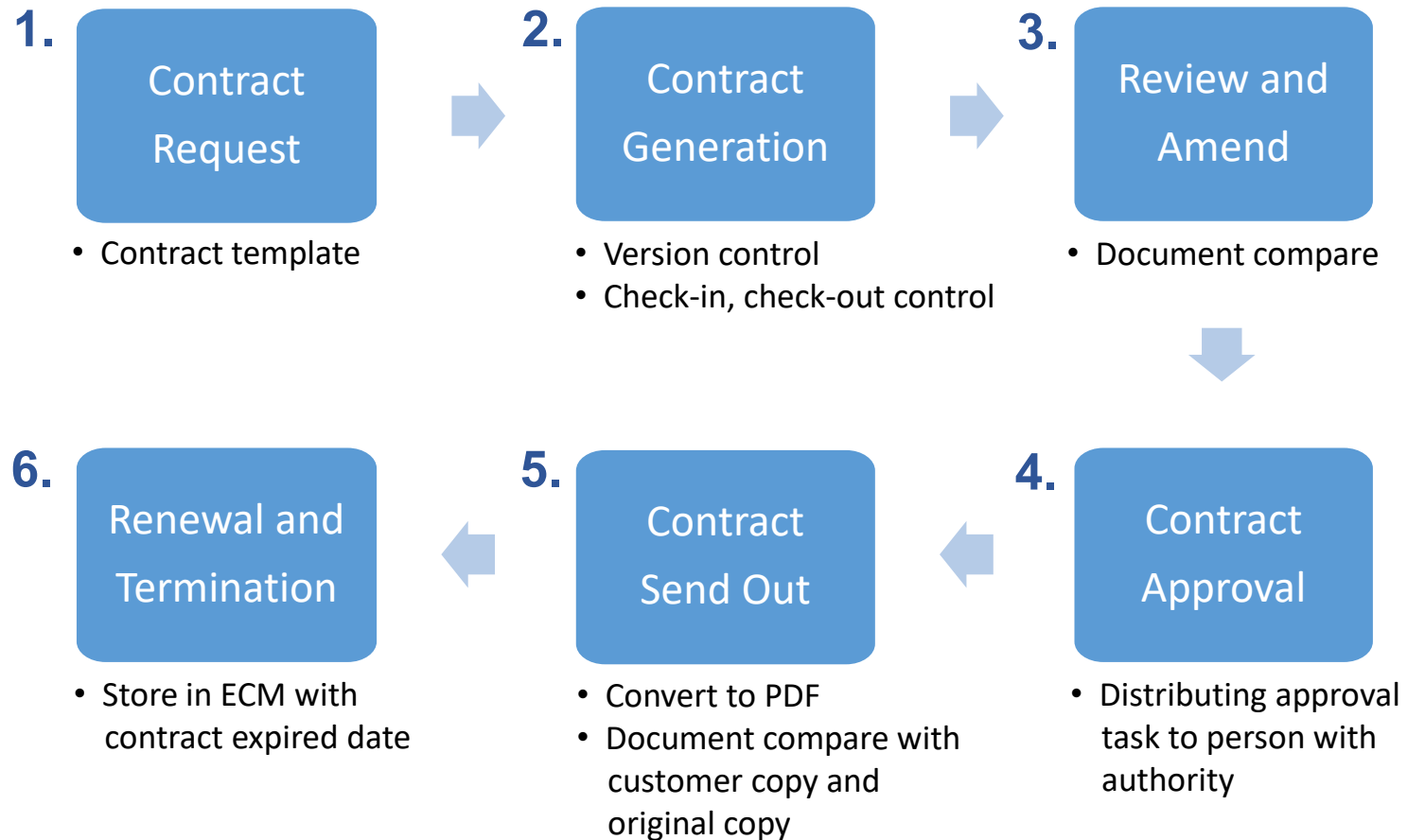
- Retention of Personnel files (e.g. delete Personnel files from the system after the staff leave the company over 7 years)

Financial Management

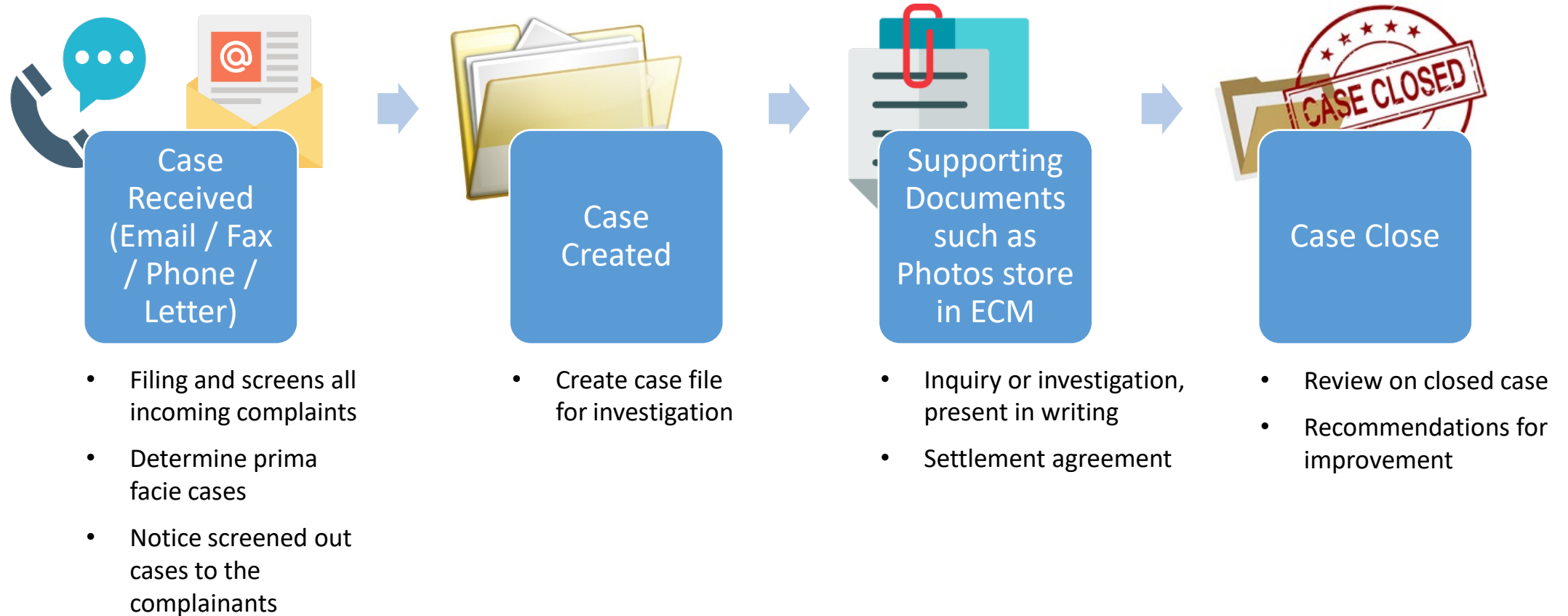
-Automate Account Receivable & Payable Processes



Contract Management



Complaint Cases Handling



Replace Chaotic and Insecure File Servers

No Encryption
Not Organized



Successful Cases



Case Study 1



Company Name

Our Hong Kong Foundation

Industry

Non-profit organization

Solution

- OceanX WorkFlow
- Office Add-in
- Outlook Add-in
- OceanX Share

Location

Hong Kong



Challenges

- Documents in File Server have many versions and not well-organized
- After finish editing, users have to print out the documents for approval process, which is low efficiency and not environmental friendly

Solution

- Major objective of this project: use **OceanX WorkFlow** to control and improve their Publishing Process
- **OceanX ECM** would be used to store the publishing documents in Project Folder structure. Different Chapter and session can be assigned to different editors to enhance the publishing process. OceanX ECM can also be used to store and share reference materials like photo, articles, movie or link
- **Office Add-in** provides check-in, check-out and version control to achieve "Single Version Of The Truth"
- Users can manage emails together with documents through **Outlook Add-in**
- **OceanX Share** enables users to securely share documents to internal and external parties

Benefits

- Better control of editorial documents
- Enhance collaboration between different users
- Ensure consistency and enforce standardization
- Enhance security such as audit trail on documents access
- Consolidate expertise
- Knowledge asset management

Case Study 2



Chiu & Partners Solicitors

Company Name

Chiu & Partners Solicitors

Industry

Legal

Solution

- OceanX ECM Legal Edition
- Outlook Add-in
- Email Management
- Office Add-in
- OceanX Capture
- Matter Folder

Location

Hong Kong

Challenges

- Matter Documents filed in File Server is difficult to search
- There is no control if any documents are missed, forgot to file, or filed wrongly in the file server
- Email filing is inefficient and difficult to search related matter's emails
- There is no control on how the documents in the server is access
- Matter Opening in accounting system

Solution

- **OceanX ECM** as the central library to control the access of matter documents with audit trail
- **Office Add-in** to let users file documents to ECM in their daily operations. Users do not need to index document as index of the document are inherited from the matter folder
- **Outlook Add-in** Email Management to let user filing of incoming and outgoing email to ECM in their daily operation. One interface to manage email and ECM
- Automatically Matter Folder creation through the integration with their accounting system
- Knowledge Management make the manage and access of precedents easier
- **OceanX Capture** help users file hard copy documents into ECM with indexes automatically captured from the documents
- Migrate old legal documents in file server to ECM Matter Folder

Competitive Advantages

- **OceanX ECM** legal edition provided a matter centric solution especially suitable for legal industry. **Outlook Add-in** make email management more easy and **Office Add-in** make filing to ECM as simple as filing to file server. **BuildingBlocks** interface provides a simple Google like search interface for user to search for matter documents. **OceanX ECM** provides comprehensive ECM solution which includes Capture, DMS, Outlook and Office integration.

Case Study 3



Organization

A Government Department
in Hong Kong

Industry

Government Sector

Solution

- OceanX ECM
- OceanX DPC
- OceanX Capture

Numbers of Users

Around 2000

Location

Hong Kong, around 80
branch offices

Challenges

- Forms (including application form and change forms) received in over 80 branch offices are sent to a central location for data entry and microfilm before the system is implemented
- Around 10,000,000 existing forms in hardcopy or microfilm have to be digitized and migrated into the new system
- Scanning process has to be decentralized to the branch location. Branch offices can only help with minimal data entry
- Forms including customers' confidential information have to be handled very carefully

Solution

- Scanner and OceanX Capture installed in branch offices
- Barcode printer to print barcode labels onto the forms
- Form recognition with barcode recognition to minimize data entry
- Validation through web service to make sure data is correct before submission
- Only some form types which need further data entry would route to central location using OceanX DPC (Document Processing Center)
- OceanX ECM in data center store all the forms
- Users in different locations could retrieve the forms in the system from Web Browser

Case Study 3



Organization

A Government Department
in Hong Kong

Industry

Government Sector

Solution

- OceanX ECM
- OceanX DPC
- OceanX Capture

Numbers of Users

Around 2000

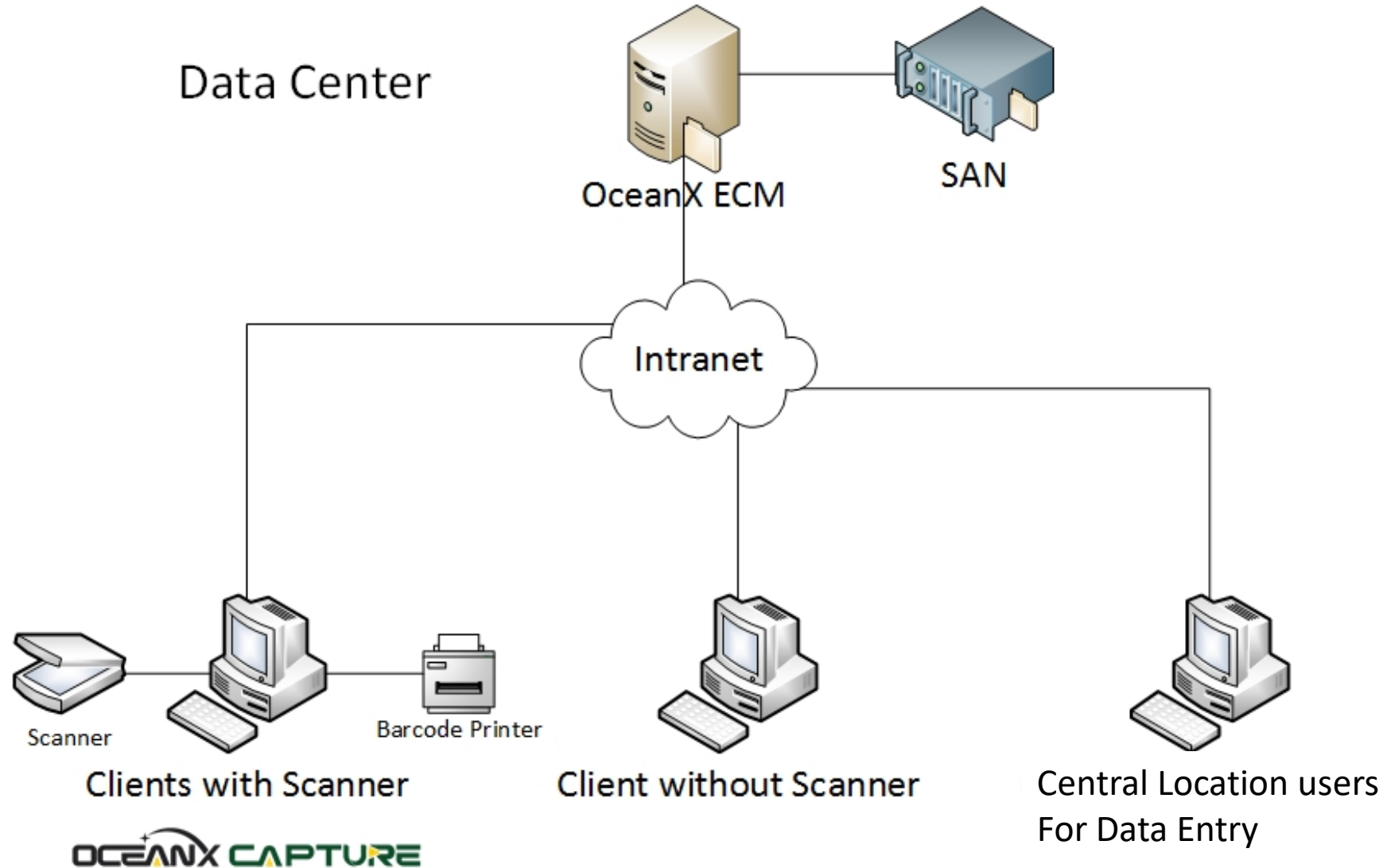
Location

Hong Kong, around 80
branch offices

Benefits

- Forms (with confidential information) do not need to be shipped to the central location
- Central location does not need to select the form types that need further data entry. The system selected the forms that need further data entry for them
- Every action included view, print and download was logged.
- Some sensitive information in the form was masked
- Users can search for forms that they needed immediately from web browser
- CSV search in OceanX ECM allows user to retrieve multiple records easily
- Supervisor could generate reports directly from the Web browser
- Forms in the system are encrypted, even system administrator could not access to the form outside the system
- OceanX Capture would delete the temp files after submit to ensure no confidential information left in the client machine
- Requesting information time is shortened from weeks to instantly
- BuildingBlocks to simplify the interface and control the features and reports available for different users.

Case Study 3



Case Study 4



Company Name

Shiseido Hong Kong Limited

Industry

Personal Care

Solution

- OceanX ECM
- OceanX DPC
- OceanX Capture

Numbers of Users

Around 1000

Location

Hong Kong



Challenges

- Personnel files of Staff in HR Department are confidential
- Some highly confidential Personnel files could only be access by a few HR Staff
- Release of Personnel files to Department Head should be controlled

Solution

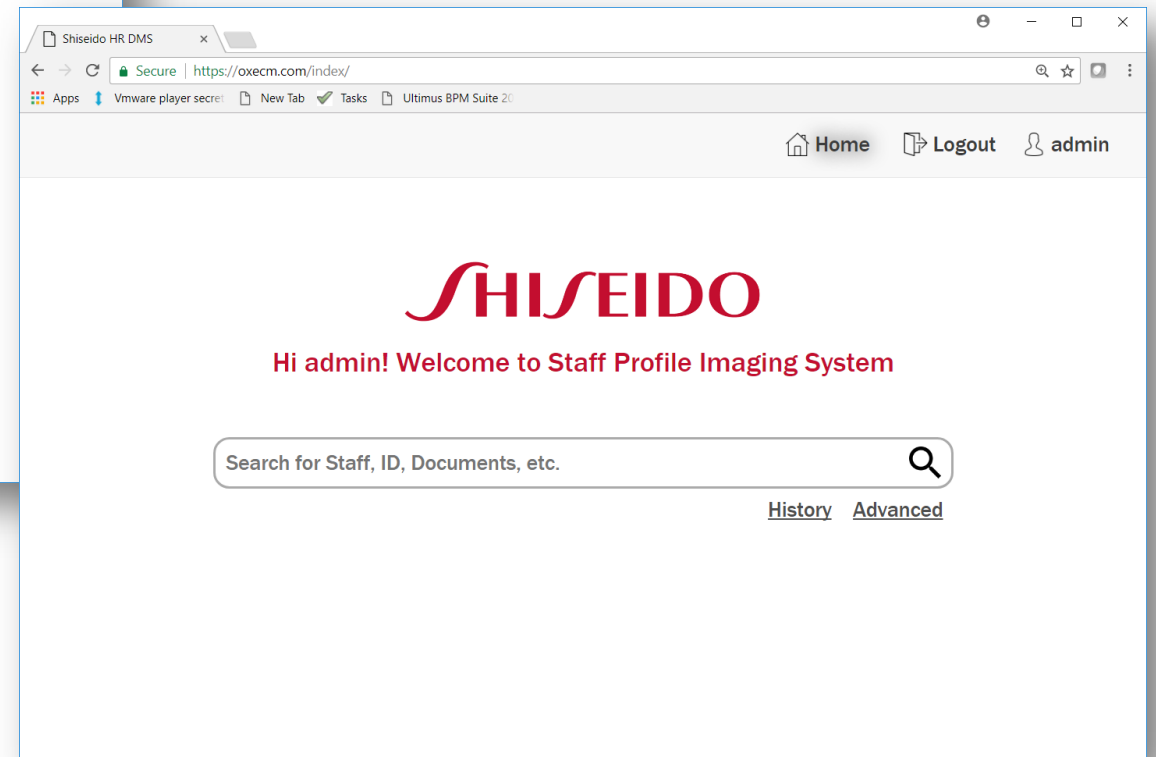
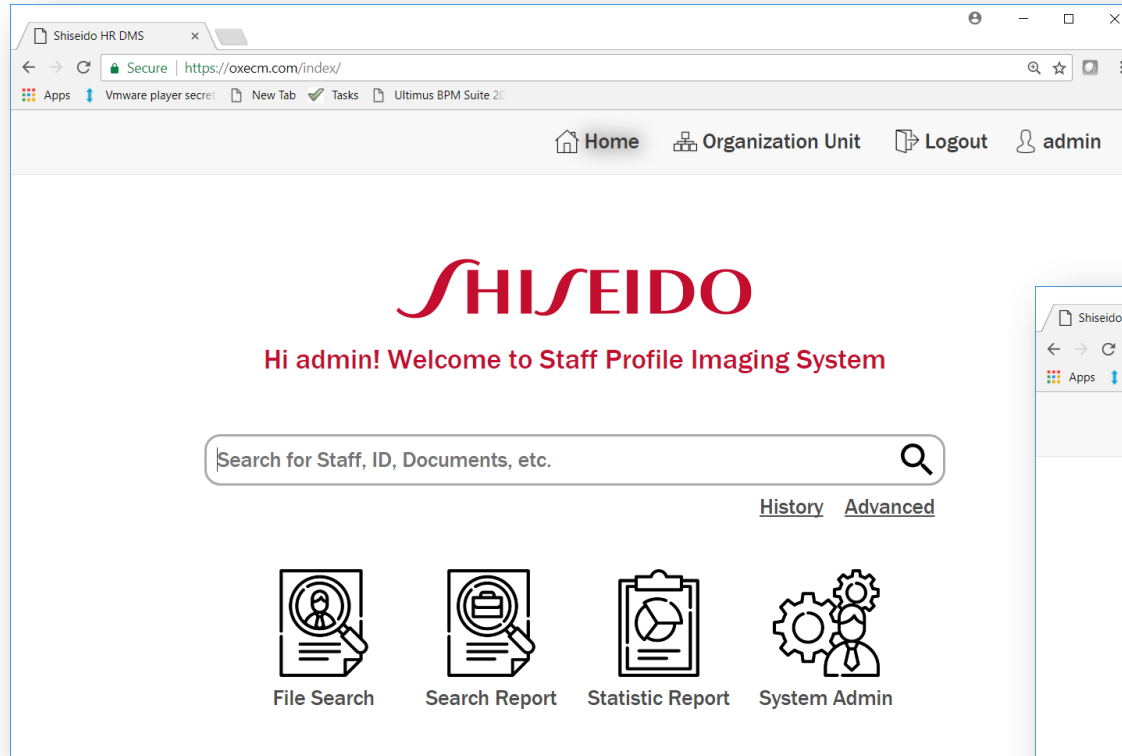
- Use **OceanX Capture** to turn paper information into electronic document
- Use **QR Code** to separate documents to different categories and eliminate the need of manually indexing
- Use **BuildingBlocks** to personalize the Interface for users
- Use **OceanX DPC** to automate and control the Releases of the Personnel files to users
- Use **Activity Log** to monitor the access history of Personnel files
- Integration with SAP for Personnel files Creation and metadata update

Benefits

- Create a paperless and environmental friendly environment
- Better Control of Personnel files Access
- Enhance the security control on Personnel files
- Department heads can access to Personnel files of their own staff instantly

Case Study 4

BuildingBlocks Interface for Shiseido



Thanks!

Contact Information

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