



EDMonline™ Product Features

September 2025

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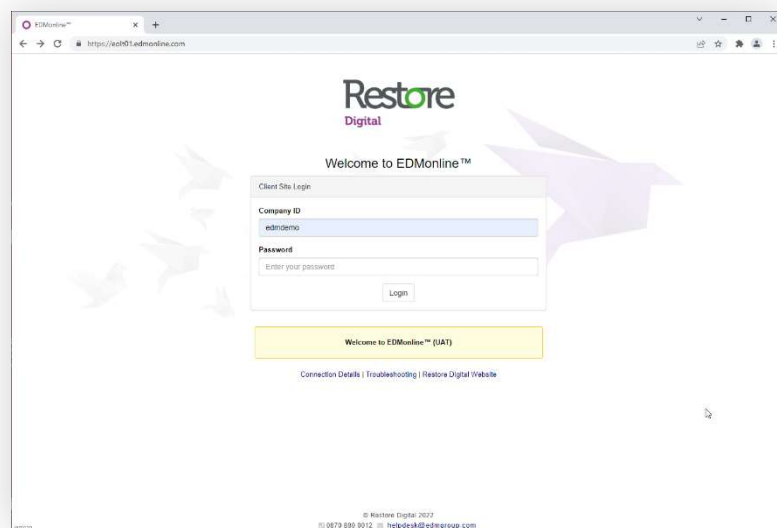
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Overview

EDMonline™ is a hosted web-based document management platform available as a service from Restore Digital.

It is utilised by organisations of all sizes, across all industries throughout the UK, Europe, and the USA, has many thousands of users and is **securely storing and providing access** to billions of documents for our clients.

As an online service, it delivers electronic document and records management capabilities to user desktops, simply, securely, and usually with little or no IT intervention.

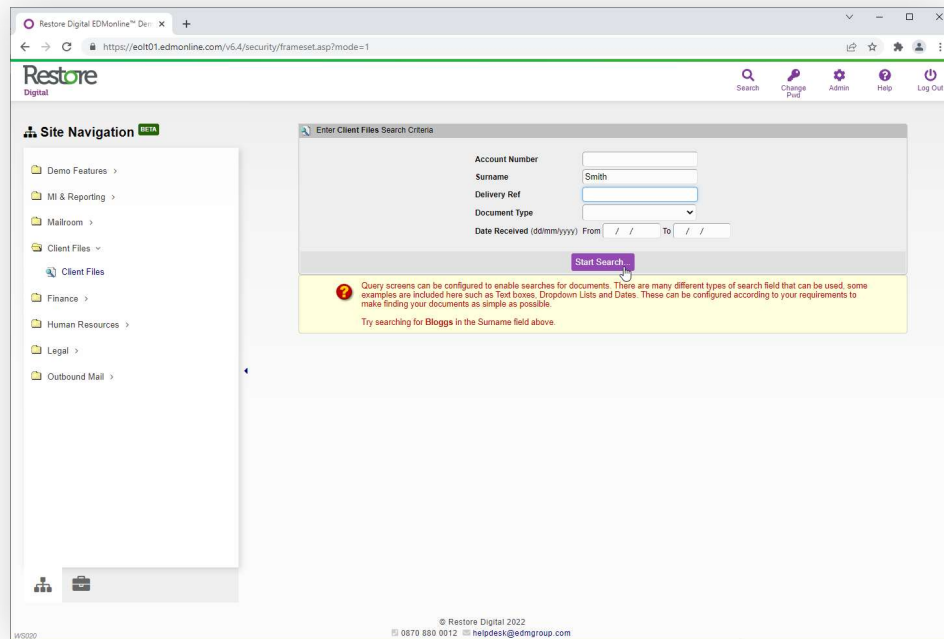


An EDMonline™ solution handles almost any type of file or scanned document and delivers significant functionality to small, medium and enterprise organisations alike.

The simple-to-use interface allows easy, rapid deployment within an organisation, delivering required management and reporting functionality within the administration interfaces and a simple, uncluttered, and customisable web front end to the user that requires little or no training.

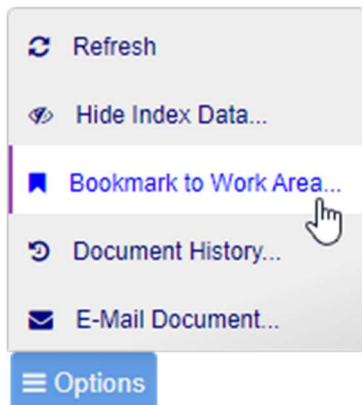
Intuitive and Easy to Use

EDMonline™ has a simple, clean, and intuitive interface making it easy for users to navigate and quickly access documents and data.



Documents are stored in tailored repositories for your organisation with customised search fields to enable rapid search and retrieval of information.

Documents and data may also be linked with key business systems to enable richer document searches, validation, and reconciliation functions.



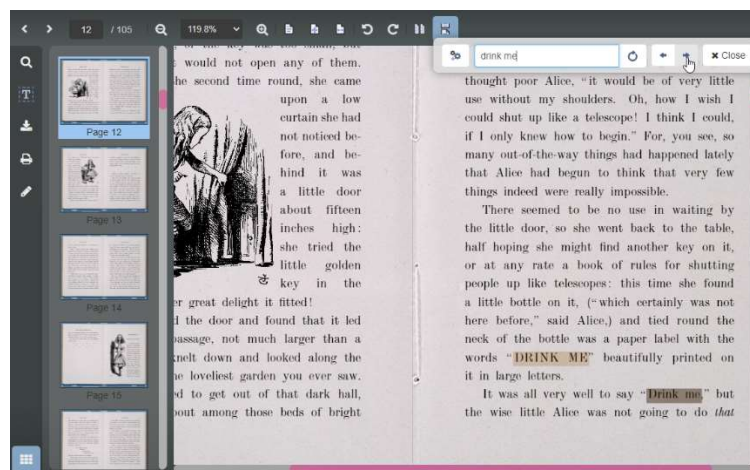
As a hosted platform your authenticated users can perform their tasks **anywhere, anytime**, enabling truly flexible and modern working across teams, departments, or the whole enterprise and removing many of the constraints often found with legacy processes.

Access can even be opened to trusted third parties to enable direct access to specific documentation or processes they are involved in.

Features such as built-in **email, document sharing, annotations** and **work areas** provide ways for users to collaborate and work together; all controlled through powerful access permissions enabling you to control exactly what every user can see and do.

Additionally, **document merging** is available meaning that separate documents can be merged and with the right user permissions may be printed, downloaded, and emailed as a single document, which can support many use cases such as audits, subject access requests, client packs and so on.

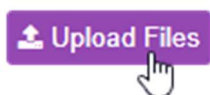
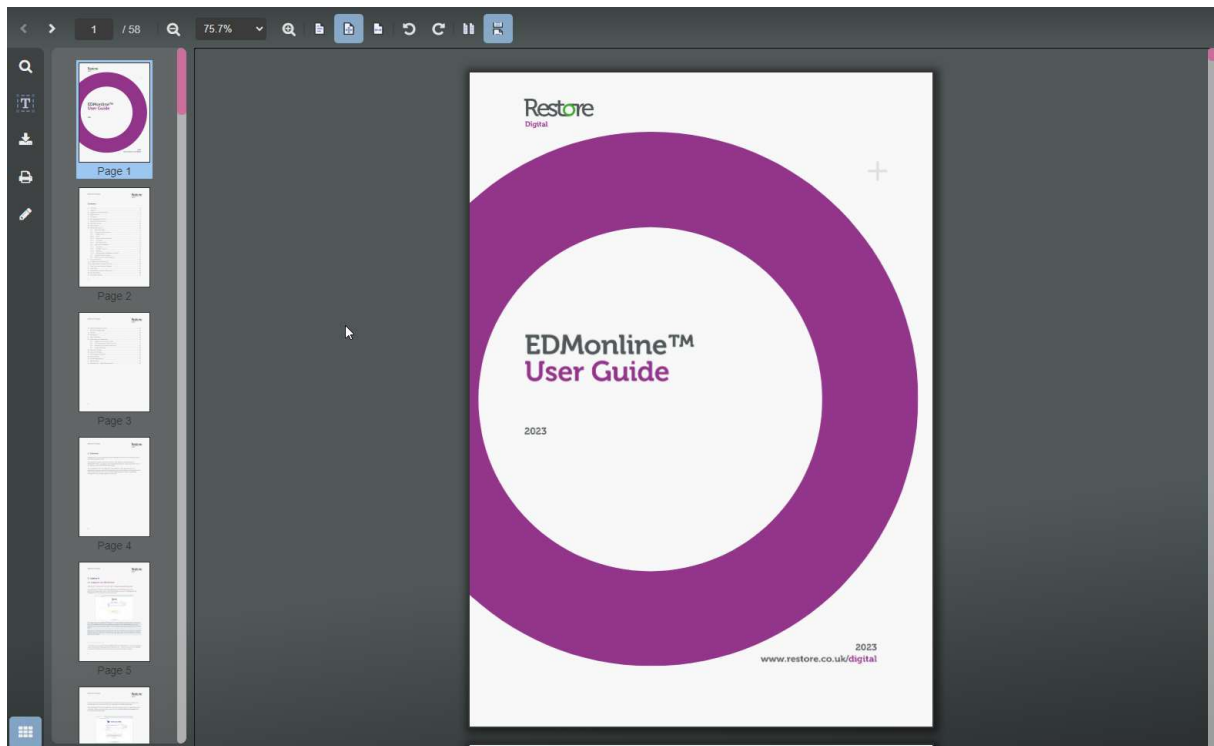
Automatic on-the-fly **Optical Character Recognition (OCR)** means that the powerful search capabilities extend to searching within documents and can be used to find text even within documents that have been scanned (as images).



Text from scanned documents can even be copied to clipboard using the **text extract** tool.



EDMonline™ supports the storage and retrieval of nearly any electronic file format¹ and its built-in viewer² can view most industry standard formats including Microsoft Office (Word, Excel, PowerPoint), scanned and fax documents, emails, and all popular image formats.



While EDMonline™ solutions often provide storage for documents processed through Restore Digital services such as **mailroom**, **archive scanning** or **email ingestion**, permitted end users may also upload documents directly into the application with the ability to use remote scanning and filing trays to organise and index documents into the appropriate repositories for ongoing storage and retrieval.

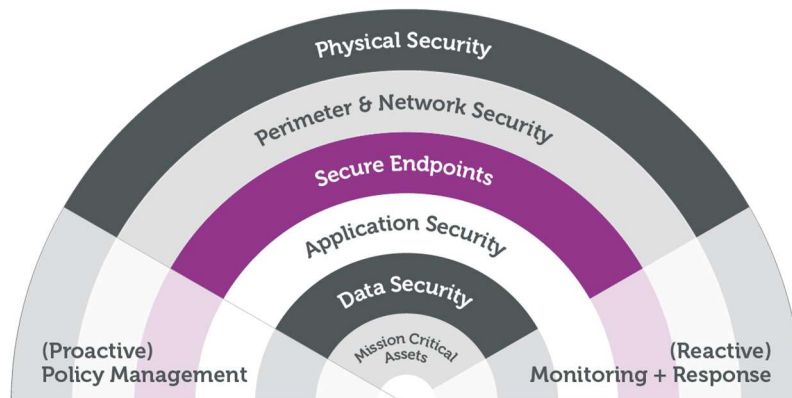
¹ Restore does not permit and will block executable file types.

² The built-in viewer does not require any client installation or third-party components. Other document viewers can be configured to be used for specific file formats if required.

Security and compliance

Store in confidence

EDMonline™ is hosted and provided as a service by Restore in secure private cloud data centres in the UK and is protected by Cisco Firewalls and NCC managed **intrusion detection and monitoring**.



A **Cyber Threat Management** (CTM) sensor is deployed within the network. This network sensor is an extremely high-performance Security Data Analytics engine, which performs full packet capture of network data and detects indicators of compromise using in-built and continually updated threat intelligence.

Additionally, we utilise a **Security Information & Event Management** (SIEM) solution which monitors security event logs on our devices 24x7x365, not only for suspicious activity and threats, but also the logging of logons/logoffs for audit & compliance purposes. The log data is captured, correlated, and securely stored, with predefined alarms raised with the Security Operations Centre (SOC) for further analysis.

EDMonline™ is **CyberEssentials Plus** certified and regularly penetration-tested by independent experts, meaning you can have confidence that we are taking the necessary steps to protect your data.



EDMonline™ clients each have their own segregated storage of documents and data, and all **access is locked down** with client specific access credentials, and most of our clients opt to have access restricted to specified IP addresses meaning that only users from your own network may access the system.

Access to the EDMonline™ website is via secure TLS 1.2 protocol with **256-bit encryption** meaning that your data is protected in transit to your users.

The highest level of document protection and **GDPR compliance** is possible using individual document encryption meaning that every document is encrypted with a secure key, preventing them from being opened outside of the EDMonline™ application; even if intruders somehow gained access to the servers they are held on.

Similarly, EDMonline™ also supports **data field-level encryption** for the most sensitive data.

Compliance built-in

Every repository can be configured with automated document and **data retention rules** to comply with your regulatory and data protection requirements in line with your own policies.

Users and access permissions are managed through the application to provide extremely granular levels of **security and control** that can be managed using user groups and security profiles.

Your administration users can be restricted to managing their own user groups, making it easy to decentralise the management of your users right down to individual teams if you wish.

Everything done within the EDMonline™ platform is logged and **audit trails** made available to relevant users, including built-in facilities for auditing access and permissions so you can always know who has access to what.

Available when you need it

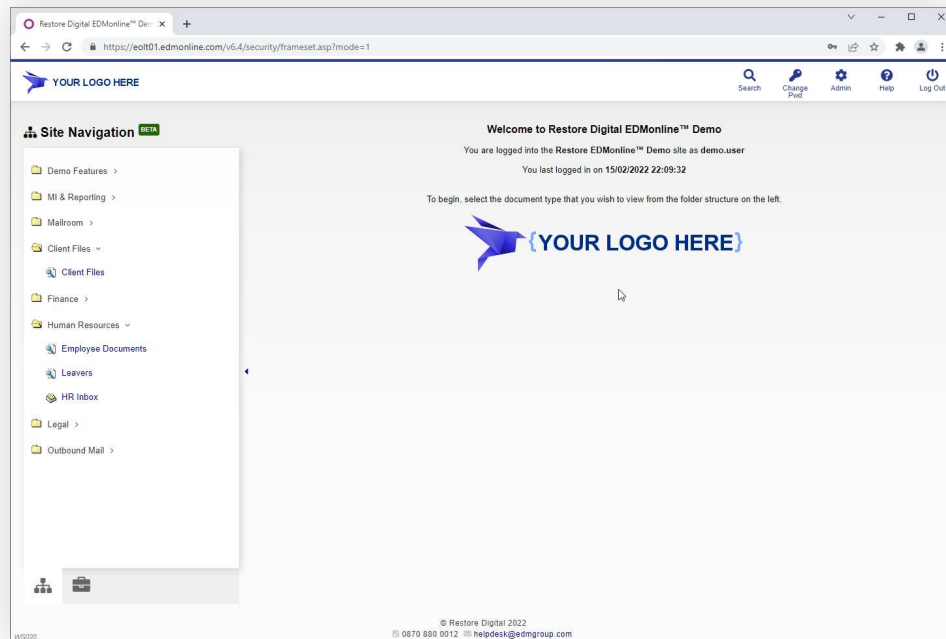
The EDMonline™ platform is designed to be **highly available** and with all data replicated securely to a secondary data centre so you can be assured that your data is safe and available to you.

Restore also offer more extensive **disaster recovery plans** with bespoke contracted recovery point objectives where desired to ensure the smooth running and access to your documents and data even in extreme circumstances.

Storing your documents and data in the secure EDMonline™ platform can significantly assist with your compliance with GDPR and other regulatory standards by giving you control over access, visibility and audit, and the tools to manage and maintain your information for years to come.

Flexible and Customisable

Almost every aspect of the EDMonline™ solution can be tailored to your needs and configured to fit in with your corporate approach.



Your site can be themed with a custom skin in line with your corporate branding and colour schemes and many aspects of the user interface can be tailored, even as far as custom user guides and helpdesk contact details for your users.

Even the security of the site can be tailored precisely to match your corporate standards with control over password and access rules, and even the ability to restrict who your authorised users can email documents to.

Work Management and Routing

The flexibility of the EDMonline™ platform enables us to provide anything from simple queuing to complex workflow and routing solutions that are tailored to your needs and can include features such as:

- **Routing of documents to work queues** or into general archive repositories based on business rules.
- **Workflow rules** to automate and control the movement of work through your business processes. This may be simply driving an **approval process** for documents or applying complex business rules and automated decisioning to determine where to route work to.
- **Automated exception handling** and facilities for dealing with them where appropriate, as an integral part of other services that Restore may be providing for you such as **Digital Mailroom** or **Scanning**.
- **Automated work allocation** to dynamically route work items to the most appropriate user(s) at any time based on users' skills, proficiency, availability, and capacity.
- **Data editing** and update capabilities with adaptive fields that can dynamically change based on the context of the work.
- Facilities for generation of template-based outbound messaging including physical **document generation** that can be fulfilled by the **Restore Outbound Print Service** or digital routes such as email, SMS, or web services.

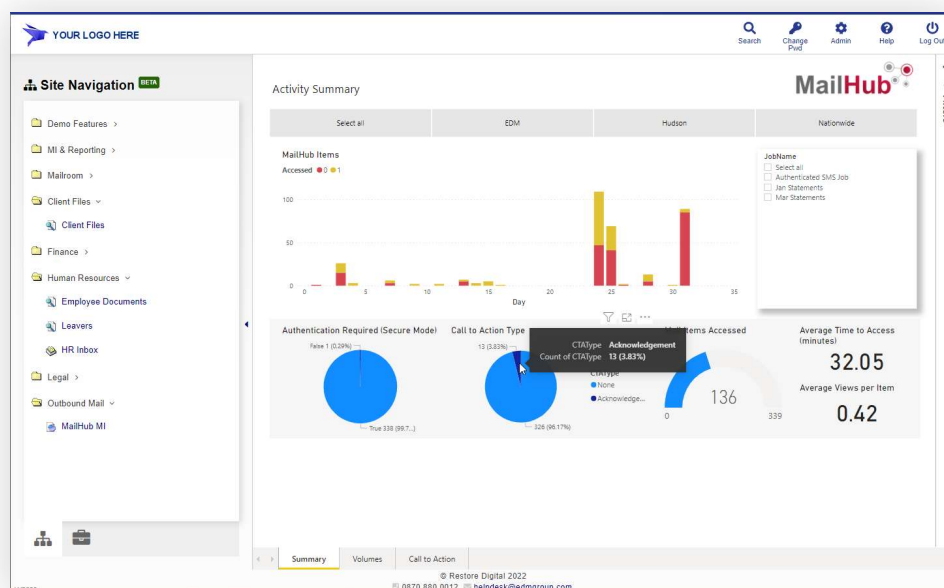
Management information

EDMonline™ has several built-in reports to enable visibility of the use of the system for administrators, managers, or approved end users. If required, additional reports can be provided tailored to your precise needs.

Standard reporting functionality available includes:

- Report filters
- Data grouping and totalling
- Drill-down capability
- Data export to CSV (Excel) / XML
- Charting functionality including pie and line charts.

For the richest experience, EDMonline™ can provide **Microsoft PowerBI** based graphical dashboards tailored to your requirements to enable full near-real time visibility of your processes and the ability to quickly spot trends and anomalies, drill-in and understand your data and even present advanced concepts such as geographical data.



Integration

EDMonline™ provides several ways to be integrated with other systems:

- **Single sign-on** for user access is supported via the SAML 2.0 protocol which can be used with all common third-party identity providers.

This enables users to be logged directly into the application from their signed-in desktops, removing the complexities and challenges associated with password management across many applications.

- An **Embedded UI** capability that provides the fastest way to document-enable almost any system by generating a secure link to an EDMonline™ document, search or other feature.

With this facility you can provide access for your users directly from your core business systems, to seamlessly retrieve, view and work on documents. While still enforcing the security controls, audit trails and functionality that EDMonline™ provides. In most cases, this is without the users ever needing to know that they are accessing a different system.

- **Data** from core business systems may be shared with EDMonline™ via secure FTP or web services to provide richer search functionality, data validation, reconciliation, and exception handling.
- If more customisation is required then there is an **API** available to perform key tasks via web services such as document search, document retrieval and document upload (ingestion).

Support

Our highly skilled Customer Services team will act as your first point of contact for any incidents, general queries, security incidents, major incidents, or service request requirements. They will ensure that all queries are logged, tracked, and effectively managed through to resolution using our service management tool to provide you with the best customer service.

The team will work closely with all resolver groups across Restore Digital to manage any issues or service requirements through to resolution. They will then work with both you and our teams to understand the root cause of an incident and resolve and mitigate against potential re-occurrence; this process will be for all incidents, major incidents, and security incidents. In addition to incident resolution, the Customer Services team will also organise and control all logistic activities, planning and arranging your document collection and deliveries, and all other inquiries that you might have with your service.

The team will be available by phone, e-mail, and through your service management portal from Monday to Friday 08:30 – 17:15 (excluding UK Bank Holidays).

Speak to your Restore Digital Sales or Account Manager if you have extended support requirements.

Use Cases

EDMonline™ is used by organisations of all sizes across almost all industries for the secure storage of documents and data.

Our clients include hospital trusts, private healthcare providers, Central Government agencies and many large and small corporate clients across financial services, automotive, construction and many other industries.

Restore offer a range of services in conjunction with EDMonline™, such as **Digital Mailroom**, **Electronic Data Processing**, **Outbound Services** and **Large-Volume Document Scanning**, for the capture, processing and secure storage and access for many different types of documents, and we have a wealth of experience and expertise in providing innovative solutions for these including:

- Insurance documentation
- Medical records
- HR employee records and filing
- Finance documents
- Mortgage and Property documentation
- Accounting records
- Client applications and new business on-take
- Client correspondence
- Legal filing
- Contract management
- Case management
- Complaints handling
- Data rooms

Feature summary

Security and compliance

- Secure hosted online repository for your documents and data
- CyberEssentials Plus and ISO27001:2013 certified
- Regularly 3rd party penetration tested
- WCAG 2.2 AA Compliant
- Restricted access with IP address security and multi-level login
- Client segregated data and document archives
- High availability UK data centres
- 24x7 access, 99.95% uptime (including scheduled maintenance)
- Granular permissions and security
- Document-level encryption (option)
- Database field-level encryption (option)
- Customisable security options
- Password/security policy enforcement
- Full audit trail of activity
- Document retention rules
- DR recovery options available
- Document Redaction capability

Intuitive functionality

- Online portal – access anywhere / anytime
- Cross-browser support (Chrome, Edge)
- Client branding and customisation
- Intuitive search and retrieval
- Tailored document searches and rich functionality
- Text search within all documents, with automatic OCR and text extract feature
- Document Thumbnails in Search and Document views
- Annotation and Redaction features with Burn-in capabilities

- Built-in Reporting
- PowerBI dashboard support
- Full user and site administration suite
- Work queue management
- Remote uploads
- Document indexing

Collaboration

- Secure Document sharing
- Work areas for case management and quick access to documents
- Document comments and mark-up
- Document annotations
- Email facilities

Specialist features

- **File Tracking** functionality
- Records management capability for use in conjunction with **Restore Records Management** service
- Workflow and document routing
- Automated work allocation
- **Restore Mailroom** integration
- Outbound document/message generation (post, email, SMS, web service)

Integration

- Single sign-on (SAML 2.0) with SCIM support
- Web-service API
- Embeddable interface



System Requirements

For optimum security and user experience, Restore recommend using the latest available versions of Microsoft Windows and Internet Browsers (Google Chrome or Microsoft Edge).

	Minimum	Recommended
Desktop Operating System	Microsoft Windows 10 (32-bit)	Microsoft Windows 11 (64-bit)
Memory	8Gb or above (in line with Operating System recommendations)	
Screen Resolution	1024x768	1366x768 or above
Internet Browser	Google Chrome	Google Chrome
	Microsoft Edge	Microsoft Edge

* Microsoft ended support for all versions of Internet Explorer prior to 11 in Jan 2016, support for Internet Explorer 11 ended in June 2022.

EDMOnline™ will work on other platforms and non-specified browsers such as iOS / Safari including Mobile Phones and Tablets and older versions of browsers such as Internet Explorer but Restore do not guarantee all functionality.

No plug-ins or locally installed applications are required.

About Restore Information Management

The UK's leading digital & storage specialists.

Restore Information Management is an agile and innovative organisation, which supports its partners in handling and processing critical information effectively. With data at our heart, we help you become more efficient but also protect you from the risks associated with managing your records.

Restore is the largest UK-owned records management, IT asset management and relocations company, working in partnership with over 55,000 small, medium, and blue-chip-sized companies from over 100 sites, covering the length and breadth of the UK.

At Restore we currently provide storage and management of over 15 million boxes in secure facilities, a high-speed scanning capacity of 800m pages per year, and shred and recycle 500 tonnes of material every week. Our customers benefit from an end-to-end solution which offers improved productivity, responsiveness and competitive edge while lowering operating costs.

We are entrusted by 88% of FTSE 100 companies, 86% of the top 50 UK accountancy companies, 94% of the 100 top UK legal practices, 67% of local authorities in England, Wales, and Scotland and 81% of UK National Health Trusts, to manage their information in various forms. This includes highly regulated industries, which are moving from physical to digital workflows.

Restore have scanned, indexed, and provided software for viewing and storing records for a variety of public and private sector organisations across the UK.