COMPANION
DATA SERVICES®

A CELERIAN GROUP COMPANY

ECM, AUTOMATION, CAPTURE & RETENTION MANAGEMENT

INTEGRATED CONTENT MANAGEMENT SOLUTIONS



THE BENEFITS ADD UP

Cost-effectiveness + Flexibility + Reliability + Risk reduction + Scalability + New life for existing IT assets + Increased efficiency + Greater automation + Higher productivity + Lower operating expenses.

DocFinity® adds up to an opportunity to change the way you do business quickly and dramatically.

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THE DOCFINITY® EXPERIENCE WORKFLOW AND CONTENT AUTOMATION

Good business is reliant on accessible, organized information about your clients, processes, systems and operations. Since 1986, CDS' DocFinity® Enterprise Content Management (ECM) software has been providing efficient solutions that capitalize on your existing applications and resources to centralize your documents and data to deliver a better customer, collaborative, and service experience.

Truly built from the ground up, the comprehensive, seamless DocFinity ECM solution is intuitive enough for non-technical administrators, and yet robust and flexible enough to be a major asset for advanced IT teams looking to centralize information management enterprise wide and fill technology gaps.

DOCFINITY GIVES YOU THE TOOLS TO:

- Manage the lifecycle of your documents
- Route documents, data, and tasks
- Automate business processes
- Collect data and files with electronic forms
- Capture values from documents for indexing, triggering workflows, and to push to other systems
- Image enable line-of-business applications to present documents while staff work in their familiar environments
- Gain insight into process and system performance with dashboards
- Comply with government and internal regulations

DOCFINITY ENTERPRISE CONTENT MANAGEMENT SUITE

CAPTURE

Scan, upload, and import documents to store and easily retrieve them in the future. Automate the process with intelligent capture options.

DELIVER

Provide anytime, anywhere access to documents, data, workflow queues, and real-time reports.

SECURE

Minimize security risks by controlling levels of access to critical files and content and applying retention rules to comply with regulations.



AUTOMATE

Eliminate repetitive tasks, standardize processes, and confidently manage record disposition.

INTEGRATE

Integrate with all of your systems, applications, and data sources to connect documents with the data held in your core applications.

THE DOCFINITY CORE

ROOT YOUR PROCESSES IN A BETTER PLATFORM

We've made Enterprise Content Management easier to use than ever. With more core features out-of-the-box than any competitive offering, DocFinity's scalability translates to affordability for local start-ups, single departments, and global organizations. If efficiency, productivity, process improvement, and automated, paperless collaboration are among your objectives, we can help you succeed starting with these core capabilities:

SCANNING: Convert paper-based documents to digital files to ease handling, save space, improve accessibility, and speed processing.

INDEXING: Categorize files with metadata for quick retrieval. Automate indexing, use blind entry fields, and check data for validity.

SEARCHING: Make intuitive keyword searches for documents, even in archives. Users pull only files and contents they're authorized to view.

VIEWING: View single documents or multi-page files. Add annotations and markups. Redact sensitive content. Rearrange, add, or remove pages.

ADMINISTRATION: Control access, task assignment and monitoring, load balancing, and security from a single, intuitive interface.

IMPORT: Object, index, and email high-speed importers automate the upload of documents and/or data into the system or a workflow process. Unlimited use.

PRINT SERVER: Print multiple stored documents without having to open them, reducing network traffic and increasing productivity.

VERSIONING: Track changes to documents, files, metadata, and markups. It preserves the history and allows you to recall or revert to previous versions.

MICROSOFT OFFICE INTEGRATION: Connect with Office applications like Word, Outlook, Excel and PowerPoint to easily upload and index files into DocFinity, and more.

APIs: Integrate DocFinity with all of your systems, applications, and data sources at the UI, web service, or database level.



DOCFINITY MODULES

BUILD ON CORE FUNCTIONALITY

A comprehensive and integrated ECM suite of products built from the ground up, DocFinity scales with your growth and expansion. In on-premise deployment environments, you can switch these modules on as you're ready for their capabilities. In cloud environments, a majority are included with your subscription. With a little training you'll be ready to weave them into your processes.

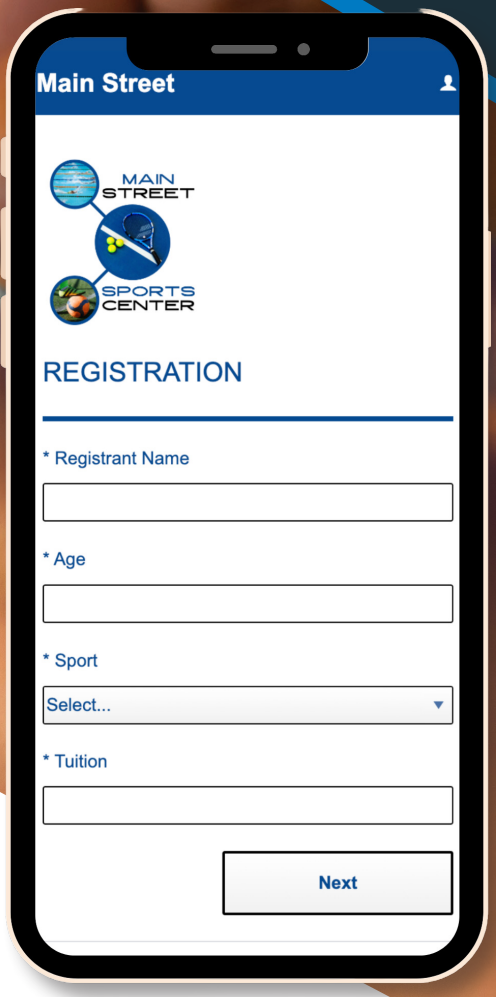
- BPM/WORKFLOW
- EFORMS
- RECORDS MANAGEMENT
- INTELLIGENT CAPTURE
- DOCFINITY SELF-SERVICE GATEWAY
- DASHBOARDS
- ENTERPRISE SEARCH
- ESIGNATURE
- PRINT TO DOCFINITY
- DOCFINITY EXPORTER
- FAX INTEGRATION
- HIERARCHICAL STORAGE MANAGEMENT (HSM)
- COLD/ERM
- HL7

SAAS OR ON-PREMISE

CLOUD EASE OR MANAGE ON SITE

In a SaaS environment, there's no upfront capital expenditure or hardware needs. Most modules are included with your monthly payment and maintenance is managed by our internal DocFinity support team. You'll be up and running quickly in a secure AWS environment, or in a top tier data center meeting HIPAA privacy, security, and transaction standards.

With an on-premise deployment, you have complete ownership and access to the back-end 24/7. You pay the license fee upfront (additional license keys are purchased as needed and activate modules in seconds), as well as an affordable annual maintenance fee. And you get all system upgrades, as well as reliable technical support from our staff.



MOBILE

ANYTIME, ANYWHERE

Some things just can't wait for you to get back to the office. With DocFinity on Mobile—standard functionality included with our core software—you can search for the documents you need, upload images, complete tasks, fill out forms, and authorize approvals from your smart phone or tablet. Our HTML5 platform allows us to provide complete mobile functionality through your device's browser from administration to dashboards to workflow design with no "app" to maintain.

AUTOMATION

DocFinity is an automation powerhouse. A tightly integrated gear-set of modules accessible from a single interface, you can easily utilize a combination of features to fully automate document and data driven processes for greater operational precision.



EFORMS

FOR MORE THAN DATA

Design simple or complex electronic forms via a drag/drop and point/click designer. Integrated with existing portals and websites, eForms reduce the need for manual entry and ensure consistent data collection. Combined with workflow, submissions can launch business processes or be a step within a process. You can also attach relevant documents to a form and gathered data can be used as indexing values.

In addition to collecting data, the eForms module can be used to display data pulled from multiple systems. Decision makers then have a complete view of all information needed in one place.

Some Features of DocFinity eForms:

- Field types include: conditional, pre-filled, required, date, currency, blind entry, hidden, etc.
- Collaborate on eForm design
- Responsive design on mobile
- Upload documents
- Add URL links within the form
- Apply data sources to fields

BPM/WORKFLOW

ROBUST FUNCTIONALITY

DocFinity BPM/Workflow allows you to model, automate, execute, control, measure, and optimize all of your processes. Through the intuitive designer, you'll deploy workflows that simply fill job queues acting as collaborative extensions of the way your people interact. Or you can build complex workflows that utilize checklists, pull data from other systems automating decisions, require approval steps, and send notifications. You may even fill technology gaps in other systems to create seamless operations.

With the drag/drop, point/click designer, you'll add annotations, manage the configuration of information displayed, and adjust views to your liking. You can also route documents, determine due dates, and add and configure User and Service Tasks.

BPM/WORKFLOW CAPABILITIES

- Eliminate costly and time-consuming manual processes.
- Direct work based on business rules and best practices.
- Flow a single piece of data, tasks, or documents.
- Streamline complex processes while remaining flexibly responsive to business changes.
- Measure performance and productivity by user, group, job, process, and/or enterprise.
- Identify and eliminate process bottlenecks
- Make educated decisions based on enterprise and individual process analytics.
- Standardize business processes to achieve consistent outcomes.
- Allow ad hoc processes using prompts.

DOCUMENT CAPTURE

REDUCE MANUAL ERRORS

Out-of-the-box, DocFinity provides importers that watch email inboxes and network folders for new documents. When captured, DocFinity can automate indexing by looking at file names and subject lines.

DocFinity Intelligent Capture options take it a step further. With both forms-based (structured) and rules-based (unstructured) options, the document is scanned for data—even lengthy detail from line items—to be used for classification, indexing, and/or triggering workflow processes, or simply to populate fields in other applications.

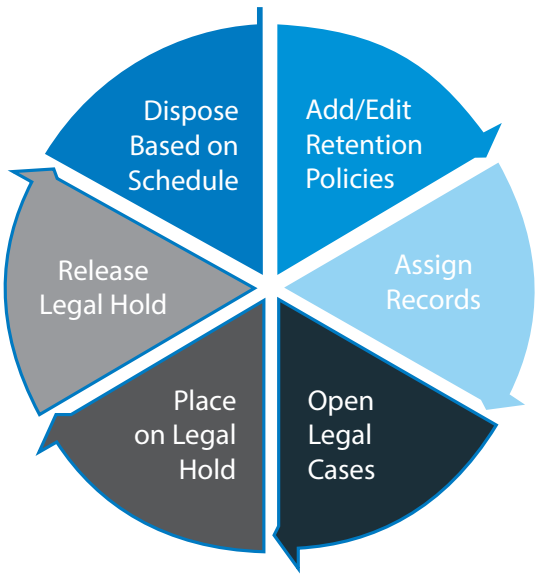
Powered by I.R.I.S. Xtract, DocFinity Intelligent Capture drastically saves time, improves accuracy, and helps standardize processing in many areas, including: accounts payable, accounts receivable, human resources, the mailroom, legal departments, reception, and various line-of-business departments.

RECORDS MANAGEMENT

MINIMIZE LIABILITY

Automate the declaration of records with pre-defined retention rules attached to document types. Custodians are notified when documents and data are ready for disposal.

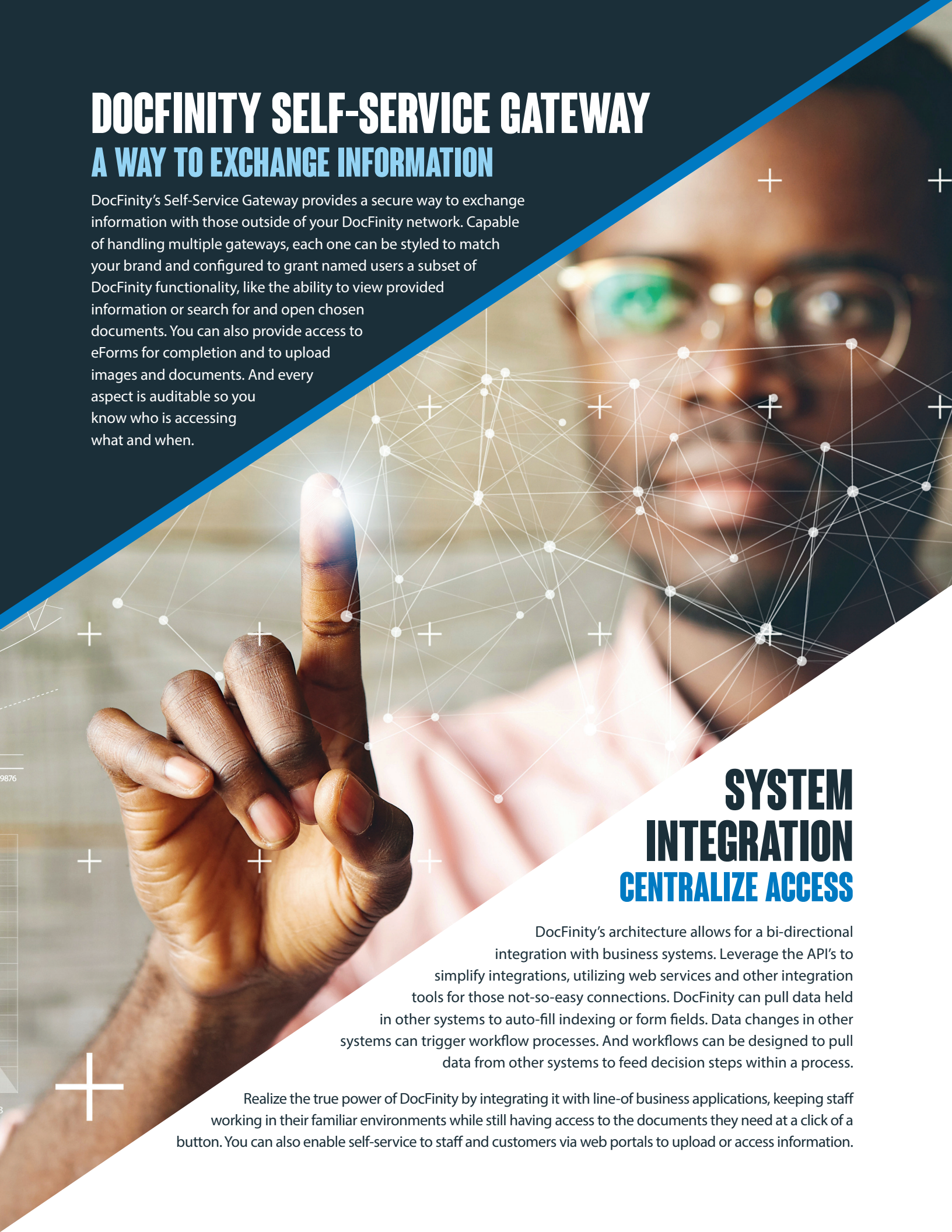
DocFinity also allows you to open legal cases placing documents on legal hold to prevent deletion, purging, and alteration, while still being accessible by staff if needed.



DOCFINITY SELF-SERVICE GATEWAY

A WAY TO EXCHANGE INFORMATION

DocFinity's Self-Service Gateway provides a secure way to exchange information with those outside of your DocFinity network. Capable of handling multiple gateways, each one can be styled to match your brand and configured to grant named users a subset of DocFinity functionality, like the ability to view provided information or search for and open chosen documents. You can also provide access to eForms for completion and to upload images and documents. And every aspect is auditable so you know who is accessing what and when.



SYSTEM INTEGRATION

CENTRALIZE ACCESS

DocFinity's architecture allows for a bi-directional integration with business systems. Leverage the API's to simplify integrations, utilizing web services and other integration tools for those not-so-easy connections. DocFinity can pull data held in other systems to auto-fill indexing or form fields. Data changes in other systems can trigger workflow processes. And workflows can be designed to pull data from other systems to feed decision steps within a process.

Realize the true power of DocFinity by integrating it with line-of business applications, keeping staff working in their familiar environments while still having access to the documents they need at a click of a button. You can also enable self-service to staff and customers via web portals to upload or access information.

ENTERPRISE SEARCH
FULL TEXT TO FULLY EXPLORE

Finding documents is simple when you know the name, account number, or other indexing values associated with a documents. But life is rarely simple, and there are times when you need to find information that is not indexed.

A powerful, full-featured text search engine, DocFinity's Enterprise Search queries the repository for text matches in many file formats such as PDF, TIFF, HTML, text, MS Office, and JPEG. It locates structured and unstructured data contained in files and other documents—and combines keyword and full-text searching to return exactly the results you want.

PRINT TO DOCFINITY
IMPORT WITH ONE CLICK

Print to DocFinity enables any document that can be printed to be indexed and imported from its native application directly into your repository. With a simple click of a mouse, DocFinity creates an unalterable PDF image of Microsoft documents, reports, Web pages, and more to be indexed and stored in DocFinity. By eliminating the need to print and scan before importing, Print to DocFinity reduces processing time and cost.

ESIGNATURE
SIGNING SIMPLIFIED

Powered by AssureSign, DocFinity eSignature provides fast and secure digital signing of documents and eForms. The signing process is seamlessly integrated with BPM/Workflow. Signatures can be performed by those internal or external to the DocFinity system. The entire signature process is audited and the report is imported along with the fully executed document.

DASHBOARDS
METRICS & MONITORING

Gain visibility into your business processes so you can proactively avoid bottlenecks and dips in productivity. Dashboards allow you to monitor DocFinity and other business systems in real-time. You'll quickly spot where workloads are light or overloaded. Plus you can monitor importers, servers, and data repositories so you can make necessary adjustments to enhance performance. You and your team can build visually-stunning dashboards without knowledge of SQL.



DOCFINITY ADMINISTRATION



TIME SAVING SOLUTIONS FROM MAINTENANCE TO DESIGN

Truly built from the ground up, the comprehensive, seamless DocFinity ECM solution is intuitive enough for non-technical administrators to configure. And yet, robust and flexible enough to be a major asset for advanced IT teams looking to centralize information management enterprise-wide and fill technology gaps.

DocFinity was built with the administrator in mind. A completely integrated system, administrators manage system setup, document taxonomy, permissions, importer setup, processes monitoring, and so much more from a single web interface—the same from which end-users search for information and complete job queues. Building workflows and eForms is nearly effortless using a robust drag & drop interface within the same modern easy to use HTML5 web application.

If your instance is deployed On-Premise, it's simple to move from a development to test or test to production environment. In as little as 20 minutes, you can upload new workflows, eForms, retention rules and system configuration with a simple file. If you're on our SaaS model, we'll make it even easier by doing it for you.

DEPLOY SMARTER

PLAN & EXECUTE SHOULDER-TO-SHOULDER

Successful projects hinge on knowledge, communication, planning, and the ease of the transition. Fortunately for you, many of our team members have stood where you stand and understand the necessary steps to achieve winning implementations. That's why the following are core aspects of the roll-out process:

DEFINING SCOPE: The DocFinity Professional Services team helps you define goals and create a detailed project plan that identifies needed resources, milestones, scope, and initial project risks, as well as who the key stake-holders and end-users are to keep open communication with during the process.

TRAINING: On-site, web-based, or self-paced, you'll learn the terminology and best-practices for designing a platform that meets your organizations goals.

IMPLEMENTATION DESIGN: You'll work side-by-side with the DocFinity Implementation team to create a suitable environment for your system and design document, data, and security plans.

MIGRATING: We make moving documents and data to DocFinity straight-forward and easy. And when files can't be moved, DocFinity can point metadata to associated images in other systems.

TESTING: Move from your development to test environment to ensure everything is working as desired and perfect your design. We'll teach you the ropes and help you make smart choices as you go.

LAUNCH: All systems go! We'll be shadowing you as you move into production to ensure a smooth launch and that you have the knowledge to continue expanding your implementation organization-wide.

24/7
U.S. BASED SUPPORT WHEN YOU NEED IT

A DEDICATED SUPPORT REP

CONSULTING SERVICES

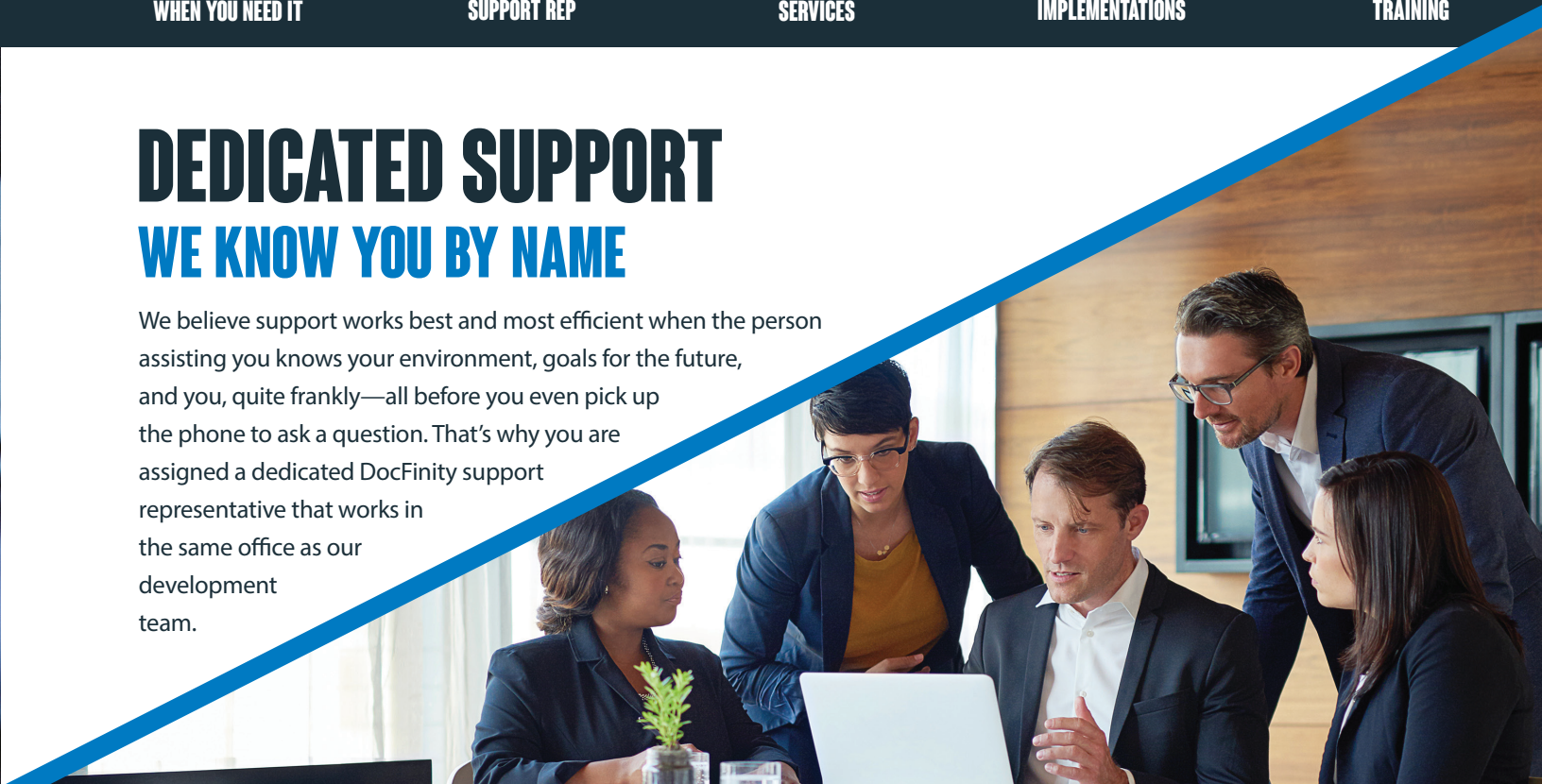
SHOULDER-TO-SHOULDER IMPLEMENTATIONS

LIVE & WEB-BASED TRAINING

DEDICATED SUPPORT

WE KNOW YOU BY NAME

We believe support works best and most efficient when the person assisting you knows your environment, goals for the future, and you, quite frankly—all before you even pick up the phone to ask a question. That's why you are assigned a dedicated DocFinity support representative that works in the same office as our development team.



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