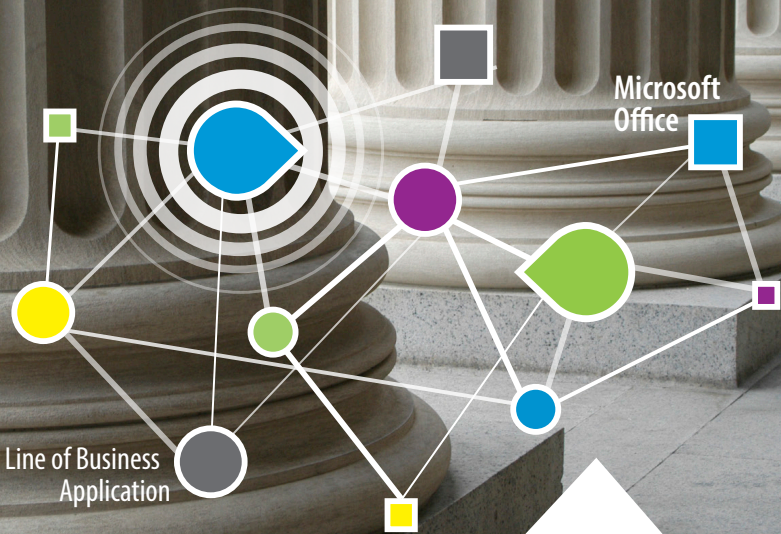


GOVERNMENT AGENCY SOLUTIONS

Enterprise Content Management
Business Process Management (BPM) / Workflow
Records Management



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800.678.3241 | www.docfinity.com

Run a More Efficient Government Agency

As a government agency, your main concern is continually serving the people and organizations of your jurisdiction comprehensively and efficiently as possible, while staying within your budget restrictions. We help governments gain control of your documents, reduce storage costs, and free up budgetary funds for services that benefit the public.

With integrated solutions that DocFinity offers, your agency can:

- **ELIMINATE PAPER**

Digitize all content. Automate indexing. Easily and securely store, search, retrieve, view, redact, organize and share documents.

- **STAY COMPLIANT**

Ensure systematic retention and disposition of records with or without approvals. Minimize liability. Manage Legal Holds timely and accurately. Log and audit all transactions.

- **IMPROVE EFFICIENCY**

Use electronic forms to collect data consistently and accurately or even validate and update data dynamically on other systems. Drive business automation by triggering a process upon submission of a form.

- **AUTOMATE BUSINESS PROCESSES**

Move documents electronically in the office. Standardize processes and approvals including electronic signatures. Monitor the work process and effectiveness. Meet Deadlines. Eliminate mistakes. Prevent tasks from falling through the cracks.

- **PROVIDE SELF-SERVICE ACCESS**

Allow residents, applicants, suppliers and claimants to view documents, complete forms, upload documents, and perform certain transactions on their own; securely and cost-effectively.

- **WORK ANYWHERE**

Use any computer or mobile device to search documents, upload documents, and complete tasks from out in the field and during face-to-face external meetings by accessing DocFinity with its intuitive web-based, zero-install interface which meets accessibility standards.

Document Management

DocFinity is changing the way you store and retrieve files. The DocFinity Core provides you with all the features and functionality to upload, index, store, search for and retrieve documents. You can lock information down to the group level so that only authorized individuals can do things such as view multiple versions of documents and download files, while the system audits every view, change, and movement. In addition, the Core provides functionality to upload files directly from Microsoft Office. And administration for the entire system is conducted from within the same intuitive interface.



Integration

The true power of DocFinity comes from integrating it with your line of business applications. Your staff can continue to work in their familiar environment while DocFinity pushes and pulls data and documents needed to make decisions with a click of your mouse.



Records Management

DocFinity removes human error from the critical task of records management. We declare every item in the system a "Record" and retention policies are applied as files are ingested based on document type.

You also are provided with all the features and functionality needed to comply with the rules and regulations passed down by the government:

- » Automate the process of applying retention policies to documents
- » Schedule and automate the disposal process
- » Assign user rights, render records in non-editable formats, redact information, and view audit trails
- » Enable legal hold support and eDiscovery compliance



DocFinity Advanced Capture

Powered by technologies like artificial intelligence, DocFinity Advanced Capture enables you to minimize human intervention during ingestion of the content and initiation of business processes. Since it recognizes content and the document type automatically, DocFinity Advanced Capture;

- Streamlines indexing of documents
- Classifies large groups of documents
- Applies retention rules for the document type
- Triggers workflows based on the extracted content
- Delivers data to other systems

About DocFinity

DocFinity® is a high-powered, next-generation Enterprise Content Management / Business Process Management / Workflow / Records Management software platform that offers superior levels of functionality, configurability, integration and security.

Built, developed, enhanced and supported by our own employees based in the USA; DocFinity has served hundreds of customers in the USA, Canada, Mexico and the UK since 1986.

DocFinity is a product of Companion Data Services (CDS), a trusted government partner; an awardee of several government contract vehicles. Certain contracts are competitively solicited and awarded. Most did not require any cost to participate. Most were publicly awarded by a Principal / Lead Procurement Agency. None of the contract vehicles are exclusive.

Managing documents, automating processes, and automating retention



**DocFinity Core
Records Management
BPM/Workflow
eForms
DocFinity Exporter**

**Fax Integration
Print to DocFinity
COLD/ERM
Enterprise Search
HL7**

**Hierarchical Storage Management
Self-Service Gateway
Dashboards
Electronic Signature
Advanced Capture**

ENHANCED FEATURES

User-Friendliness	<ul style="list-style-type: none"> » End-user productivity and satisfaction » Simplified and customized interface for defined job roles » Interface meets WCAG 2.0 accessibility standards
Configurability	<ul style="list-style-type: none"> » Rich administration interface providing infinite configurability. » No dependence on costly or unreliable source code modification for customization.
Multiple Environments	<ul style="list-style-type: none"> » Flexible commissioning and decommissioning of various environments like Development, Test, Validation, Quality Assurance, Training and Pre-production without affecting the actual production data.

SECURITY AND COMPLIANCE

Enterprise-wide Deployment	<ul style="list-style-type: none"> » The same instance of the system ensures that sensitive and confidential data is well-segregated and shared on a "Need to know" basis among various departments, as determined by the policies.
Compliance	<ul style="list-style-type: none"> » Minimized risks of disclosing or compromising protected data including Protected Health Information (PHI) and Personally Identifiable Information (PII).
Role-based Security	<ul style="list-style-type: none"> » Establish and maintain a security profile for certain roles easily » Easily update security settings when a user moves from one role to another within the organization
Auditing	<ul style="list-style-type: none"> » Full control over business transactions; especially critical in environments where confidential, government-sensitive data is processed. All activity is tracked and audited within the system.

INTER-OPERABILITY

Integration	» Achieve seamless integration with other applications with no programming effort.
Open Format	» Easy access to content in DocFinity repository by other applications - Open database schema storage of documents in the native format and file system. » Trouble-free export and migration of content and metadata out of the system

DEPLOYMENT OPTIONS

On-Premise	» License the software for use in your own data center; keeping the data in house, and supplying and maintaining the infrastructure. Purchase the licenses for the modules you need.
Cloud (SaaS)	» Let our experts install, update, maintain and secure the server-level hardware and software and infrastructure for you with zero capital expenditure. All modules included in simple pricing model.

SUPPORT

Implementation	» Accurate system configuration and successful implementation that meets the business objectives; taking full advantage of the potential of the software suite.
Training	» Maximize use of the powerful tools provided; getting the most out of the system.
Technical Support	» Support is accessible via the web, email and phone. An individual point of contact is assigned to each customer, with a team behind them, to ensure effective ongoing support.

CONTRACT VEHICLES

Companion Data Services / DocFinity was awarded a Digital Solutions & Records Management Master Agreement from Region 4 ESC-TX and is now available to government agencies, education institutions, and nonprofits nationwide through OMNIA Partners. For more information on additional contract vehicles please visit www.docfinity.com.

