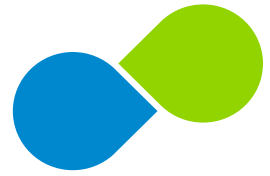




Imaging and Document Management for School Districts

Improve Efficiency District-wide with ECM

A publication from Companion Data Services



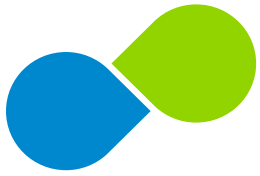
Increase efficiency throughout your school district

Whether you work in public or private school, DocFinity has a solution for your administrative needs. Since 1986, DocFinity has enabled educational institutions to become more efficient, cost effective and productive. Schools and school districts benefit from workflow, document management, and business process management solutions as well as document imaging and electronic storage. DocFinity can help you be more efficient and offer better, faster service. We design, build, and support our products to ensure that you get the quality solutions and services you deserve.

DocFinity is designed to leverage the tools you already have so you can achieve more from your investments. Whether you are looking to enhance existing departmental solutions, or are envisioning an eventual unified district-wide solution, DocFinity can help. Our imaging, document management, and Business Process Management (BPM)/Workflow solutions help school districts capture, store, index, retrieve, and manage information digitally so you can find what you need, when you need it. DocFinity digital workflow and business process management solutions push forms and tasks to the right people for action at the right time, which eliminates data redundancy while increasing efficiency and service.

Benefits of installing DocFinity software as a district-wide implementation include:

- **Cost-savings.** Instant and shared access to information, decreased storage space, and automated processes will affect the bottom line in every department.
- **Scalability.** You can start in a single department, then expand the solution as you are ready.
- **Ability to integrate with applications district-wide.** Implementing on an enterprise-scale allows you to access your documents from within the applications that you use every day.
- **Ease of use.** DocFinity's simple drag-and-drop interface makes it easy to design workflows even if you do not have programming experience.
- **Simplified processing for staff.** Data that is shared between systems and departments (e.g. financial, HR, payroll) does not need to be continually re-entered and instead can be updated automatically.
- **Improved compliance with FERPA, HIPAA, CIPA, and other requirements.** DocFinity gives you the security, accessibility, and data integrity that you need to ensure confidentiality and protect your information.
- **Quick response to requests.** Whether stakeholders have questions about student status, board meeting minutes, payroll, benefits, or other areas, DocFinity puts answers at your fingertips.



Electronically manage student and administrative documents

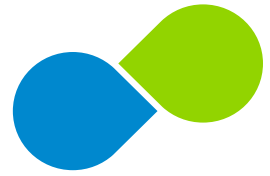


The objective of our educational system is to teach our children and to prepare them for a technology-driven world. Ironically, most of our schools are locked in outdated manual and paper-based processes and methodologies. Not only is this sending our students the wrong message; it is also not a cost-effective way to operate in a system where budgets are shrinking and costs are growing.

DocFinity can help schools and school districts reduce costs, improve services, and minimize risks by offering secure and reliable electronic management of student and staff records. Secure web-based access to information improves services to colleges and universities that request information, as well as to parents and other stakeholders.

Transitioning to DocFinity will help your district save money and improve efficiency:

- Electronic forms expedite standard requests and collection of information, ensuring that it is complete.
- Improved access and management with the ability to centrally store, index, and manage student/staff/employee records, payroll records, board meeting minutes, contracts, and other documents.
- Scanning tools convert paper documents to electronic and make them accessible immediately from any web browser.
- BPM integrates with a school's diverse business and administrative software applications, automating requests for documentation and other standard, routine tasks.
- Records management tools allow you to automate records retention, disposition, and migration schedules. This ensures that your records management strategies are not prone to errors associated with manual processes. Student information is available when it is requested, and records are disposed of according to industry regulations.
- Districts can reduce costs associated with storage, mailing, printing, and searching for information.



Manage Student Records Electronically

The ability to coordinate clerical and academic records, maintain attendance records, and perform daily administrative activities is vital to the success of students and the school.

DocFinity can help by allowing you to:

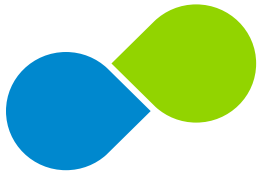
- Standardize processes: Enrollment, grade changes, add/drop, and more.
- Create a secure central repository of student records that can integrate with your school management software.

This allows staff and other authorized personnel to:

- Improve student services.
- Accelerate processes.
- Enhance information sharing and collaboration.
- Reduce costs.

DocFinity helps K-12 schools and school districts to centrally store images of paper-based documents, digital transcripts, and other files, as well as emails, faxes, photos, and videos. Users can scan materials into the system for indexing and electronic storage, making them available instantly to staff who are authorized to view the files. Electronic forms enable easier and standardized collection of information and requests, and scanning tools enable quick ingestion of high-volume, routine forms.

BPM integrates seamlessly with electronic forms and other applications to automate standard processes. DocFinity offers a complete records management system for both student and staff files. Transcript requests and other actions that involve multiple parties or require approvals, signatures, or other actions can be completed in a fraction of the time previously required with multiple software applications or paper.



Library Services

The typical school library houses books, media, and other resources that serve students and teachers. Library personnel need access to borrowers' information and library documents in order to provide efficient services as well as to address delinquent returns and overdue payments.

DocFinity can improve school library processes in a number of ways:



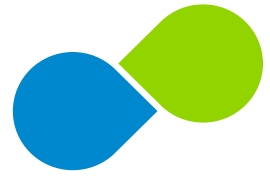
- Electronic processing ensures that all actions taken by borrowers are documented and that sensitive issues such as denial of borrowing rights are thoroughly documented.
- BPM can enable the late return of books and media to launch an automated action — such as a letter to the borrower or an invoice — and can be integrated with the accounting system to optimize efficiency.
- Electronic forms combine with BPM to standardize book reservations and ordering, as well as assist with new book purchasing and inter-district book borrowing programs.

Special Education

The ability to share information is vital to the well-being of students with special needs. DocFinity enables you to make information available securely to authorized personnel from any web browser, regardless of geographical location. Assessments and evaluations are readily available; and parents, counselors, therapists, doctors, and other stakeholders can play a more active role to help students with special needs succeed.

DocFinity helps Special Education departments:

- Compile comprehensive records — even if content is stored in multiple places. Academic performance reports, medical records, psychiatric evaluations, etc. can be accessed securely by authorized personnel from within the school management software system.
- Create and manage IEPs, and simplify progress reports.
- Comply with FERPA, HIPAA, and other regulations by providing strict confidentiality measures, data integrity, disaster recovery, security, and audit trails.
- Share information and ease collaboration efforts by making information available via web browser or portal while protecting privacy.



Human Resources

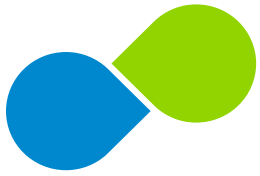
Managing information from job applicants, employees, and even board members can be challenging. Documents and data need to be collected and available securely to the right people, at the right time from the posting of a position through an employee's hiring, management, and even after departure. Applications, resumes, contracts, credentials, disciplinary actions, reviews, benefits, and productivity reports require efficient storage and timely action.

An electronic document management system offers more than easy access to information. Automated alerts, reports on who has accessed and action taken on documents, and digital workflow mean no more missed deadlines but instead, easier compliance, and faster processing of materials that require action. With DocFinity, organizations have a human resources management system at their fingertips. This helps them attend to their diverse constituents more efficiently with immediate, personalized service.

DocFinity helps HR departments:

- Simplify, expedite, and electronically manage onboarding, credentialing, and other document-intensive processes.
- Image-enable payroll, recruiting, and other HR documents so that they can be viewed directly from within your HR application.
- Simplify audits with the ability to centrally store, access, and manage documents electronically.
- Ensure confidentiality, security, and data integrity with audit trails and robust accountability measures.
- Manage records throughout the entire document lifecycle with the ability to automate retention and disposition schedules.





Grant Proposals and Funding of Special Initiatives

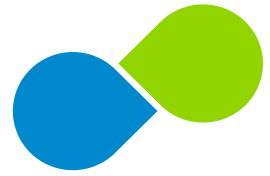
Government and local grants for special projects and initiatives involve a lot of paper and backup documentation. Finding what you need quickly and ensuring that the data is accurate, updated, and complete can be a challenge. Do not waste time in the paper chase. DocFinity document management and BPM software can help you reduce your search for information from hours and weeks to minutes and seconds.

DocFinity can help by:

- Automating and standardizing the grant proposal process.
- Centralizing all applications, supporting documentation, etc.
- Securely storing all grant documentation.

With a complete line of electronic forms, document imaging, and scanning tools to store and index paper, photos, images, faxes, emails, and more, we can connect you to all of your critical information. Instead of spending time looking for information, you can act on it. Notification of grant application deadlines, renewed grant opportunities, report deadlines, and other important actions can be automated so that you never miss another important date. BPM ensures that documents are pushed through the hierarchy for needed signatures, approvals, and decisions. Instead of searching offsite for important research, you can access information in an instant—from remote campuses or anywhere in the world via the web.





Accounting and Finance

Simply stated, if you are not automating your accounting processes, you are hemorrhaging money. How much staff time is spent matching documents with requisitions, receipts, invoices, and other supporting documentation? How much money are you losing if you are unable to take advantage of early pay discounts from vendors? How much would you stand to lose if you can not demonstrate accountability? The good news is that once you have a handle on your business processes, it is not that hard to get them under control.

This is what you need to do, and how DocFinity can help you do it:

1. Convert from paper to electronic processes.

Right now, you are probably dealing with both paper and electronic media. DocFinity makes all of your information available electronically in a centralized, secure repository. This eliminates costs associated with printing, mailing, and storage. It also helps eliminate errors, lost documents, and missed deadlines. It is a critical step toward efficiency, but at this point you have barely scratched the surface.

2. Automate A/R, A/P, and invoice processing.

DocFinity BPM/Workflow allows you to establish best practice rules for processing invoices and receivables with consistency and accountability. Clean invoices and receivables can be processed immediately and approved electronically, with minimal human intervention. This frees your highly-skilled staff to handle exceptions and discrepancies. Automation helps you expedite turnaround, eliminate errors, and repurpose staff. It also gives you an overview of the status of accounts in the revenue cycle at all times. In addition, DocFinity keeps you apprised of processing volumes and potential bottlenecks.

3. Leverage Optical Character Recognition (OCR) systems.

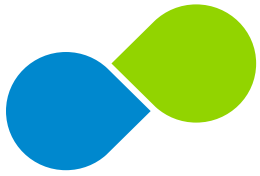
DocFinity allows you to automate capture of data contained within documents and use it to simplify various accounting processes. That may mean matching invoices with receipts, or flowing requisitions for approvals. In the big picture, it means that you can further streamline approval and posting, processing more documents with fewer staff.

4. Implement records management strategies.

DocFinity allows you to automate archival, retention, and disposition schedules. This ensures that records are retained and disposed of according to industry standards. DocFinity also helps with disaster recovery, ensuring business continuity in cases of fire, flood, or other disaster.

5. Implement governance procedures.

DocFinity provides accounting departments with transparency, security, and accountability. BPM/Workflow demonstrates beyond refute who accessed what documents, and when, allowing you to establish rules to ensure consistency. This simplifies audits and compliance initiatives, and allows you to provide better service to students and staff.



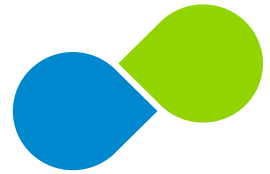
Improving Payroll Processes

Do you spend too much time looking for documents that support your payroll process? Whether you already have an automated payroll package, are writing payroll manually, or have a hybrid system in place, DocFinity can help you to work faster and more efficiently. DocFinity stores all of your check images, documentation, pertinent emails, status changes, and other information centrally, helping you find what you need with the click of a mouse. With the flexibility to point to and draw from information stored in PeopleSoft, SAP, Oracle Financials, and other accounting packages, we help you reduce errors, eliminate redundancy, and manage tasks more efficiently. Seamless integration means no more searching for related images, documents, or related correspondence – all files are secure, yet available for those who need them.

- Automation allows organizations to build on the efficiencies of electronic document management, pushing the right tasks to the right people at the right time, and automating standard processes such as approval, denial, and signatures.
- Electronic forms help expedite processing with self-service. Staff can submit Absence Reports, Address/Name Change Forms, Time Records, and other verifications and requests electronically. Upon submission, they can immediately be launched into an automated workflow.
- Reporting software gives management an overview of staff productivity. It also facilitates compliance through easy documentation of who viewed files and rendered approvals or signatures, helping managers to further streamline their processing.



Enterprise Initiatives



- **Compliance:**

Regardless of the department, DocFinity can help you comply with FERPA, HIPAA, SOX, and other regulations with electronic document/lifecycle management, digital workflow, and auditable transparency. You can define and enforce privacy and accountability measures. You can see who has accessed which files, the times of access, and the actions taken. You can give management and regulatory bodies secure access to information to demonstrate your compliance. And you can preserve accuracy, integrity, and confidentiality.

- **Records Management:**

Establishing a records management program can prevent unauthorized access, manipulation, and inadvertent destruction of files; help mitigate or prevent litigation; help comply with record-keeping procedures in accordance with corporate and government policies; ensure consistency; and streamline procedures. In fact, it can reduce risk considerably by automating retention and disposal schedules. It can reduce costs by migrating inactive records to inexpensive storage media. It can create clear and present audit trails, as well as disaster recovery measures. And it can ensure immediate access to records when you need them.

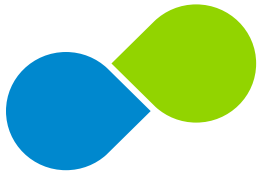
- **Forms Management:**

Creating, storing, distributing, and managing forms electronically helps streamline admissions, registration, HR, operations, and other processes — improving turnaround times, communications, efficiency, and accuracy. You will process applications more efficiently and return decision letters more quickly. You will enable students, faculty, and staff to submit forms via the web, automatically launching them into the appropriate processes. You will improve compliance with HIPAA, FERPA, and other regulations. You will eliminate the need to devote space to storing documents, reduce processing errors, minimize manual keying, and automate retention and disposition schedules as mandated for student records.

- **Image Management:**

With thousands of documents — student records, transcript requests, applications, administrative reports, internal paperwork, and more — image management has to encompass more than scanning documents to your server. Accurate indexing and searching, retrievable archiving, reliable security, and intuitive management capabilities are necessary to help you keep up — and to comply with regulatory mandates. DocFinity provides all that and more. It enables students, parents, faculty, and staff to submit forms securely via the web, automatically launching the appropriate process. It offers your district the ability to recover documents in the event of flood, fire, or other disaster. And it supports TWAIN- and Kofax®-compliant scanners.





How it Works

From capture to COLD, from storage to retrieval, from BPM and workflow to archiving and disposal, DocFinity makes your work easier. Since 1986, we have been dedicated to developing software and services that enhance business performance. Our solutions improve information management, enable better decision-making, boost responsiveness and customer service, and reduce operational expenses. Here is how DocFinity works:

Capture



Our competitors charge extra for additional scanning stations and the volume of data scanned. We can not figure out why. So, we do not. Instead, we make it easy to get data, documents, and files of varying formats into the system quickly. Whether paper or electronic, DocFinity imports business and back-office documentation and information with a number of user-friendly tools:

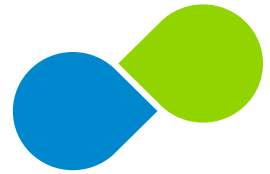
- Scanning captures paper documents as they enter your organization.
- Indexing lets you categorize information the way you want to, retrieving it quickly and easily.
- Object Importer lets you import any type of file and save it to a batch for later indexing.
- Index Importer checks specified directories containing metadata and document pointers, automatically indexing documents into the repository.
- Email Importer lets you monitor email accounts and import emails and attachments.
- Print to DocFinity creates PDF versions of documents and saves them into the repository.
- COLD-ERM captures print streams for easy storage and retrieval of computer-generated reports.

Access

DocFinity's principal benefit is the ability to locate, retrieve, and put documents into your workflow immediately and securely, no matter where you are. That is why DocFinity gives you:

- A variety of search features that let you locate documents quickly by template, category, tree, and full text.
- Intelligent search that delivers a 'hit list' of documents and files that meet search criteria. Results can be re-ordered and re-sorted on the fly. Thumbnails let you see images and other documents without opening them, and tabs allow you to click between hit lists.
- Four different views that let authorized users (customers, clients, partners, suppliers, and others) access files securely from a browser.
- Print Server that prints multiple stored documents without having to open them.
- Enterprise Search to enables full-text searches of information in your documents.

Architecture



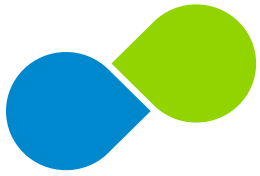
Because DocFinity is built on Java, J2EE, and Web Services, it can be a cross-platform, enterprise application, running on various operating systems and interfacing with various databases. Its architecture and technology constitute a powerful, flexible ECM and BPM suite that is reliable, easy to administer, and scalable to enterprise needs. It accommodates application server clustering, load balancing, and failover for performance and reliability. With one simple installation, administration and configuration are streamlined and occur in one central place.



DocFinity supports two servers that use the J2EE standard:

- JBoss, the most widely used J2EE server, is bundled with DocFinity, creating one simple installation. Because DocFinity automatically installs and configures its own J2EE application server, you do not need J2EE expertise in-house. This makes DocFinity a wise and convenient choice for organizations with limited IT staff. And since JBoss is open source, DocFinity can keep costs lower for customers.
- WebSphere, IBM's application server, is included to support the numerous organizations already utilizing it.

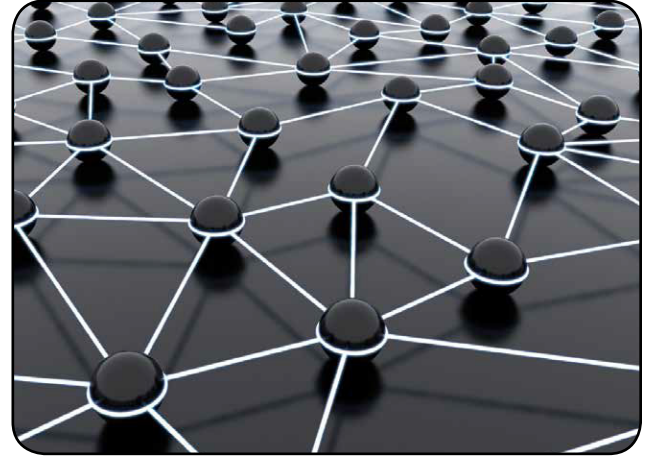
With JBoss and WebSphere, DocFinity covers the most widely used application servers on the market, making it an efficient choice for many organizations. As administrators know, enterprise systems never retire; and DocFinity is built on a proven, industry-standard framework. It represents a wise, long-term investment in broadly used technologies that will be supported well into the future.



Integration

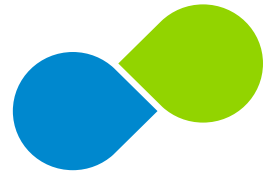
After access, the biggest benefit of DocFinity is its ability to integrate with existing software applications, back-office systems, websites, portals, and other sources of business information. That lets you take advantage of even more of DocFinity's power by:

- Image enablement that puts information at people's fingertips by integrating documents with line of business applications.
- Automating processes and tasks by integrating data from existing applications or sources.
- Offering students, stakeholders, employees, and staff self-service options through webpage/ portal integration.
- Extending auto-indexing to existing data sources to make retrieval even more efficient.



Because DocFinity is open, flexible, and extensible, it enables integration on a number of different levels to ensure compatibility with your existing systems:

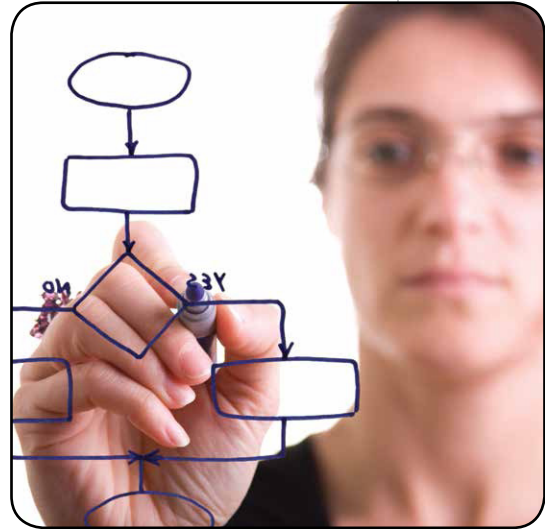
- DocFinity is written in SOAP-based Web services, which are published to our client base to leverage the APIs, simplifying integration, regardless of underlying protocols. Unlike ECM systems that use proprietary architecture, DocFinity's open standards give you the flexibility to enhance communication between systems.
- URL APIs enable integration with a simple URL call.
- Integration with Microsoft Office allows you to retrieve and upload documents from Microsoft Word.
- Fax Integration allows you to integrate DocFinity with electronic fax servers.



Automation

DocFinity's BPM capabilities make it easy to use and configure workflows. Browser-based, all of its features — from process modeling and design to activity and task processing — are intuitive, easy to use, and proven to be effective. With BPM and workflows that push information throughout the organization for faster turnaround and greater efficiency, DocFinity will help you:

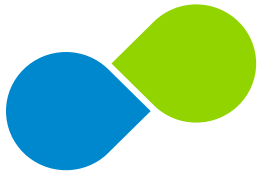
- Eliminate the need to pass documents manually.
- Streamline electronic routing to reduce cycle times, paper flow, and manual processing.
- Increase productivity, efficiency, and accuracy by assigning rules to automatically drive the required actions, in their proper order, to the responsible individuals or group.
- Expedite and prioritize business to enable group routing, distribute tasks, and prevent bottlenecks.
- Comply with company and industry regulations for privacy and standardization, ensuring compliance and accountability.



System Administration

DocFinity streamlines system administration with a simple, intuitive, web interface for all configuration and management activities. This allows administrators to:

- Handle complete system administration from any location.
- Manage the entire system from a single interface.
- Minimize the time and effort devoted to administration.
- Reduce your total cost of ownership.



Records Management

Due to regulatory guidelines, you may be required to retain student, employee, and staff records for years — sometimes decades — beyond the point at which they are accessed regularly. Compliance also requires you to dispose of records and other documents after prescribed retention periods. Failure to comply can expose your institution to fines and other penalties. Along with retention and disposal, long-term storage and disaster recovery are equally critical considerations. And, at any time, you may be required to produce documents on demand by an auditor, an attorney, a stakeholder, or an interested party.

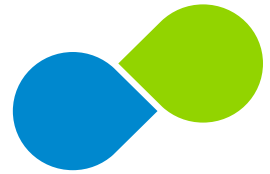
DocFinity automates your records retention/disposal schedules, backing up all of your vital information—all without human intervention after the initial set-up.



It lets you manage your records throughout every stage of the document lifecycle, providing:

- **Archiving and long-term storage.** When records are no longer accessed regularly – but have to be retained, archived long-term to comply with regulations, and accessed on request – DocFinity lets you migrate them to inexpensive storage. This saves money and ensures retrieval is immediate.
- **Disaster recovery.** Configure DocFinity to copy documents to off-site storage or to multiple servers at multiple sites. You also can configure it to perform backups whenever you specify, removing the potential for human error, as well as risks associated with floods, fires, tornadoes and other disasters.
- **Retention.**
By allowing you to automate document retention schedules, DocFinity ensures that records are available when needed and are not destroyed prematurely.
- **Disposal.**
DocFinity automates records disposal, ensuring that documents are not held beyond their mandated retention periods.

Purchasing Options



After almost 40 years, we understand that no two institutions are alike. So, we build options into our software and our pricing. We go the extra mile to meet your circumstances and your needs. And we offer the best price-to-feature ratio on the market. That is just how we do things.

1. DocFinity Cloud:

Eliminates all capital expenditure, lump-sum payments, and commitment to a large-size purchase from day one. Subscription includes the functionality of all modules; except Fax Integration. The Add-on Tools desired are licensed separately, as needed. Technical support, maintenance, updates and upgrades are included in the subscription fees. Hosting, managed services, cloud administration and a complete stand-up of a single-tenant computing environment is included.



2. On-Premises:

Might be right for customers that have already invested in the hardware, operating software, and network as well as have the resources to support operations. Modules and Add-on Tools desired are licensed separately through a One-Time License Fee (OTLF), as needed. Technical support, updates and upgrades are covered by a separately-priced maintenance contract. Fees for certain functionality (API, DocFinity Self-Service Gateway) are charged per year, and they include support and maintenance.

Solution Component	DocFinity Cloud	On-Premises
DocFinity® Concurrent Users	Monthly subscription	OTLF; Licensed Separately
Data Storage	Monthly subscription	Customer-Provided
DocFinity® Software Modules	Included	OTLF; Licensed Separately
DocFinity Maintenance, Support, Access to Upgrades and Updates	Included	Optional; Separate Contract
Server Hardware and Operating Software	Included	Customer-Provided
Server Maintenance, Support, Upgrades, Updates and Repairs	Included	Customer-Provided
Server Installation, Operations, Security, Disaster Recovery	Included	Customer-Provided
Personal Computers and Mobile Devices	Customer-Provided	
Internet Connection	Customer-Provided	
Scanners, Printers and Multi-Function Devices	Customer-Provided	
NOTE: Exceptions exist. Contact CDS for details.		

The Bottom Line

DocFinity's Imaging, Document Management, and Workflow capabilities electronically route information to automate the management of admissions applications, alumni gifts, student records, HR files, and other materials. Transcripts, applications, letters of recommendation, email messages and their attachments, and other documents can then be used to update student and alumni records. Because they produce faster decisions and turnaround times, those capabilities have helped some institutions increase enrollments. DocFinity also expedites operations in admissions, alumni relations, athletics, registrar, student services, financial aid, and other departments.

Improving efficiency improves productivity and employee morale, even as it improves services to students and faculty. As a measure of institutional success, that is a sound bottom line.

Contact Us Today

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