Xerox® DocuShare® Flex Content Management Platform

Secure Cloud Sharing and Configurable Solutions

xerox ®

Cloud-Based ECM to Digitize Your Content

Companies today struggle to manage all the documents, content, and processes that drive their business – and for many organizations that data is growing every year.

Yet for a small to midsized business (SMB) or department, large enterprise systems are often inflexible, costly, and slow to implement. Enter a cloud solution that's simple, and easily adapts to your business.

XEROX® DOCUSHARE® FLEX MAKES IT SIMPLE

Xerox® DocuShare® Flex Content Management Platform is a cloud-based software as a service (SaaS) application.

Designed to help SMBs and enterprise departmental teams easily manage and organize their business content and set up business rules to automate and drive common processes, it has tools you need to help you manage your business effectively.

With its advanced capabilities, you're empowered to connect to line-of-business applications and create custom document types to support your unique departmental needs. Deployment takes days, not months, and requires little to no IT support or employee training thanks to its cloud-based, intuitive design. Users can get started immediately.
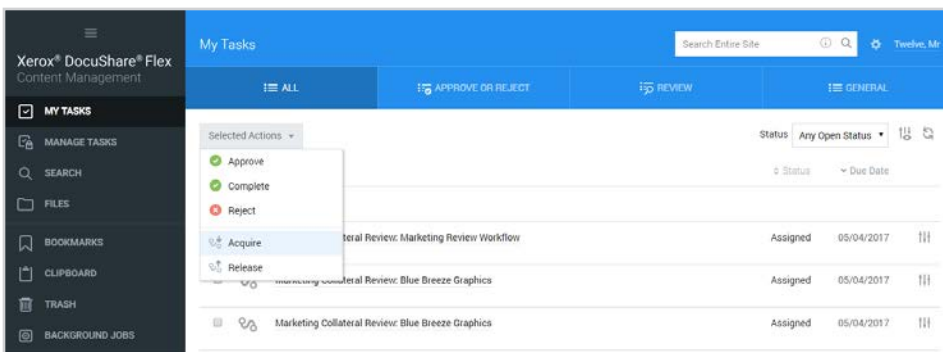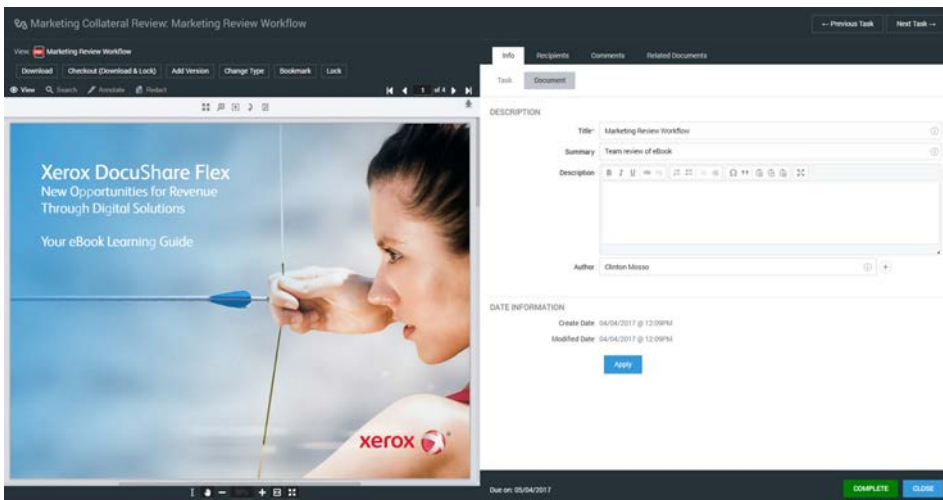
Most importantly, DocuShare® Flex is highly scalable to meet changes in user numbers, storage space and specific process requirements.
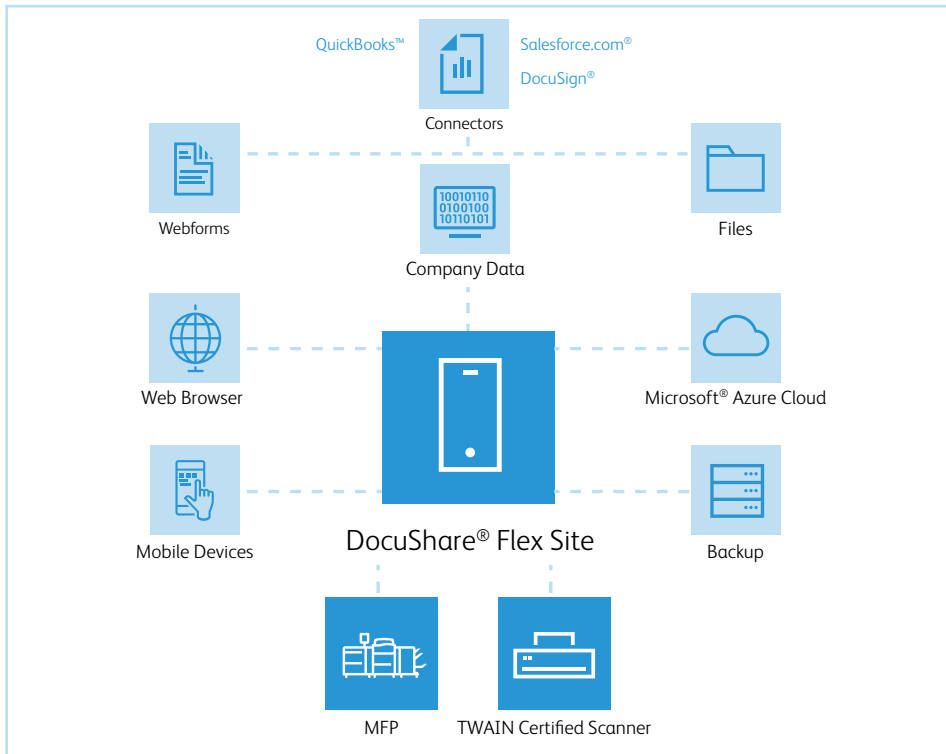
WHAT'S DIFFERENT ABOUT DOCUSHARE® FLEX?

DocuShare® Flex is the next-generation platform that carries over many aspects of the classic, award-winning DocuShare®.

The new platform introduces:

- SaaS-based cloud delivery for quick adoption
- 100% web-based, updated user experience
- User-driven workflows that do not require costly professional services
- Higher scalability, to grow with your business
- Extensibility to connect to your line-of-business systems, such as enterprise resource planning (ERP)
- Portability to save your business rules and reapply them in other departments
- Optional built-in user management
- Permission enhancements for elevated security

For the SMB or department, Xerox® DocuShare® Flex offers basic, intermediate and advanced features to grow with your requirements.

QuickBooks™   Salesforce.com®
DocuSign®

Connectors

Webforms

Company Data

Files

Web Browser

Microsoft® Azure Cloud

Mobile Devices

DocuShare® Flex Site

Backup

MFP   TWAIN Certified Scanner

KEY FEATURES AND FUNCTIONALITY

- **Intuitive Web interface** to promote adoption
- **Scan** instantly to a secure, shared cloud
- **Document version** control
- **Multi-file drag-and-drop** for fast upload
- **Mobile-friendly** interface and app
- **Task assignment, escalation and management** to align organizational content to your business processes
- **Reporting** to track activity and gain insights
- **Integration** with corporate directory services
- **Connectors platform** to integrate with ERP, CRM and other line of business systems
- **Advanced security framework** for governance and secure collaboration
- Easily created, fillable **Webforms**
- Integrated web **Capture**
- **Built-in OCR** with full text search capability to easily convert information to knowledge

MANAGE AND COLLABORATE

DocuShare® Flex helps you categorize, store, organize and manage the full lifecycle of your business content in a secure central repository in the cloud. Employees manage their content through the intuitive interface where they can easily organize files.

	Manage document properties, permissions and tasks
	Assign tasks and manage employee workloads
	Email content from your repository as an attachment, zip file or URL, or into a workflow
	Create team folders that **drive notifications and email collaboration**
	Cloud access empowers workers to manage business content in DocuShare®, internally share links to content (rather than attachments)

CAPTURE AND INDEX

To tackle the massive flow of paper documents through your organization, DocuShare® Flex boasts powerful features to capture and digitize them.

Simple, easy scanning to the cloud:
- Ad hoc capture from Xerox® MFPs, or TWAIN-certified scanners
- Multi-file drag-and-drop upload of documents
- Barcoded separator sheets for batch scanning
- Scanning into workflows, files or individual folders – from on-site and off

Intelligent data extraction and image editing:
- Automatic, cloud-based OCR in all languages
- Smart Document Viewer with annotation, redaction and burn-in capability
- Database integration to auto-index properties
- De-skew, de-speckle, compression, rotation, and PDF export

Securely Access Content, and Manage Its Lifecycle

No matter where your employees are or what device they're on, they can have quick and secure access to individual or team content. This is available across desktops, browsers and mobile devices 24/7. And with a powerful full-text search engine, employees can easily find files in just seconds.

Control who can access, author and view documents. You can conveniently protect content with user and group ability to set access controls, as well as an administrator view of all permissions. In addition, you can enable automated data archiving, reviews and destruction, and benefit from reporting and security audit trails.

PROCESS EFFICIENTLY

Xerox® DocuShare® Flex is not just a central platform to store, share and edit content. It is also designed to boost productivity through user-friendly routing tools and automated workflows:

- **Intuitive routing** helps you create and manage tasks and escalate for non-responses
- **Configurable task management** to categorize your processing tasks
- **Business rules** designed for business-level use let you quickly automate processes
- **Global business rules** work across all folders and teams
- **Automated periodic document** review and disposition policies make lifecycle management simple
- **Update of external databases** through business rules
- **Business process automation** enabling solutions such as contract management, accounts payable, and HR onboarding

THE POWER OF THE CLOUD

In addition to easy configuration and setup, as well as the ability to scale, the cloud also frees up your IT staff from the burden of inefficient administrative management. Additionally there's no need to worry about security. Xerox follows industry best practices in cloud security processes, procedures, technology and physical measures—from encrypted user authentication to scheduled backups, off-site storage and site replication—to ensure the safety and availability of our customer's data.

Connect and Transform Your Workplace, Driving Growth

Many organizations may have multiple back-end applications that don't work together. The result is information silos – CRM, cloud services and finance applications that hold vital business data but are not "synced". Linking these systems can require expensive integration.

Connectors for Xerox® DocuShare® Flex simplify the way you manage your business by providing integration with core line-of-business applications. The Connectors feature simple "no code" setup, and intuitive use. The Connectors enable bi-directional data exchange with four external solutions—for more efficient processes and faster business results.

Xerox® DocuShare® Flex Connector for Salesforce®
Link to documents such as contracts from Salesforce®, and create DocuShare® Flex workflows such as routing a new Salesforce customer to legal for approval.

Xerox® DocuShare® Flex Connector for QuickBooks™ Online
Enables a flow of invoice documents into DocuShare® Flex workflows for approval, saving back into QuickBooks™ Online.

Xerox® DocuShare® Flex Connector for DocuSign®
A DocuShare® Flex folder can be synced with a DocuSign® envelope, to add digital signatures and then lock the document.

WEBFORMS TO DIGITIZE AND AUTOMATE PROCESSES

Many processes in business use forms—yet paper forms are slow and inefficient. **Webforms for Xerox® DocuShare® Flex** is an add-on that helps your organization go paperless and digital, by letting workers capture information dynamically and on the fly, anywhere and from many devices (mobile, laptops, PCs) in easy, fillable forms.

Webforms can be designed by DocuShare Flex users, using simple tools or templates, enabling workflows like:

- Collecting data – fill out the form (answer questions), click submit

- Filling out requests or giving approval— submit the form to initiate a process

- Executing a process like HR onboarding, registration, or e-government requests

Webforms can also trigger workflows, and can be saved, re-used and even chained together into consecutive automated processes.

FIT-FOR-PURPOSE CLOUD SOLUTIONS

Xerox® DocuShare® Flex is a cloud application that is fit-for-purpose to manage content, and configurable to your needs. Built on a standards-based application development platform, it enables highly tailored document automation solutions.

Xerox will offer packaged solutions, and with its partners can also provide services to build solutions.
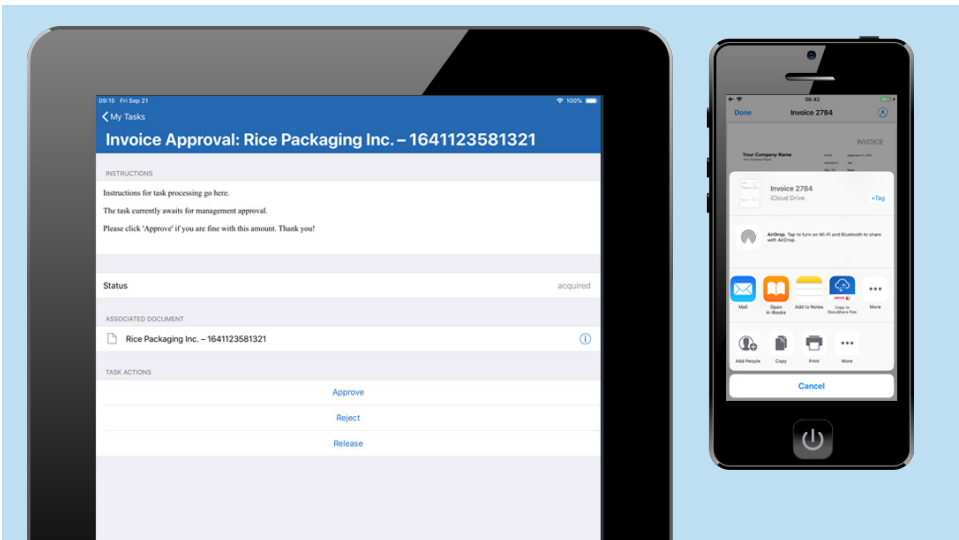
ACCOUNTS PAYABLE AUTOMATION FOR XEROX® DOCUSHARE® FLEX

To reduce the time, labor and cost of processing invoices, **Accounts Payable Automation for Xerox® DocuShare® Flex** is a solution toolkit that enables:

- Ingesting paper and electronic invoices and AP documents (including 3rd party ingestion)
- OCR conversion, recognition and extraction of metadata
- Auto-fill-in of metadata from databases
- Multi-level review and approval workflows
- ERP integration

- Secure storage and archival
- Easily styled reports and dynamic dashboards
- 3 way matching
- Ability to connect to web validation
- Document matching
- Holiday schedules
- AP workflow process template with configurable roles, approval levels, delegations and interfaces

The solution requires engagement of Professional Services.

XEROX® DOCUSHARE® FLEX APP – ON THE GO

Today's workplace is mobile—you take your work with you. The **DocuShare® Flex App** is a mobile application supporting a range of features. You can login, search and view documents, download, upload and share them, manage tasks including workflow approvals, and do easy mobile capture.

The App is available for iOS iPhone and iPads, through the Apple iTunes Store for download.

To learn more about DocuShare® Flex, visit xerox.com/docushareflex or docushare.com.

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