



DocRecord™

Work Process Automation & Enterprise Content Management

EXPANDING TRADITIONAL ECM
All-Inclusive Platform For Midsize Organizations

Powerful | Comprehensive | Affordable

prism
software

DocRecord Version 7

ALL-INCLUSIVE DOCRECORD EXPANDS TRADITIONAL ECM

All-Inclusive Platform

DocRecord is a powerful ECM application that is specifically designed for the requirements of the midsize organization. It is affordable, all-inclusive, and it is priced simply by the concurrent user.

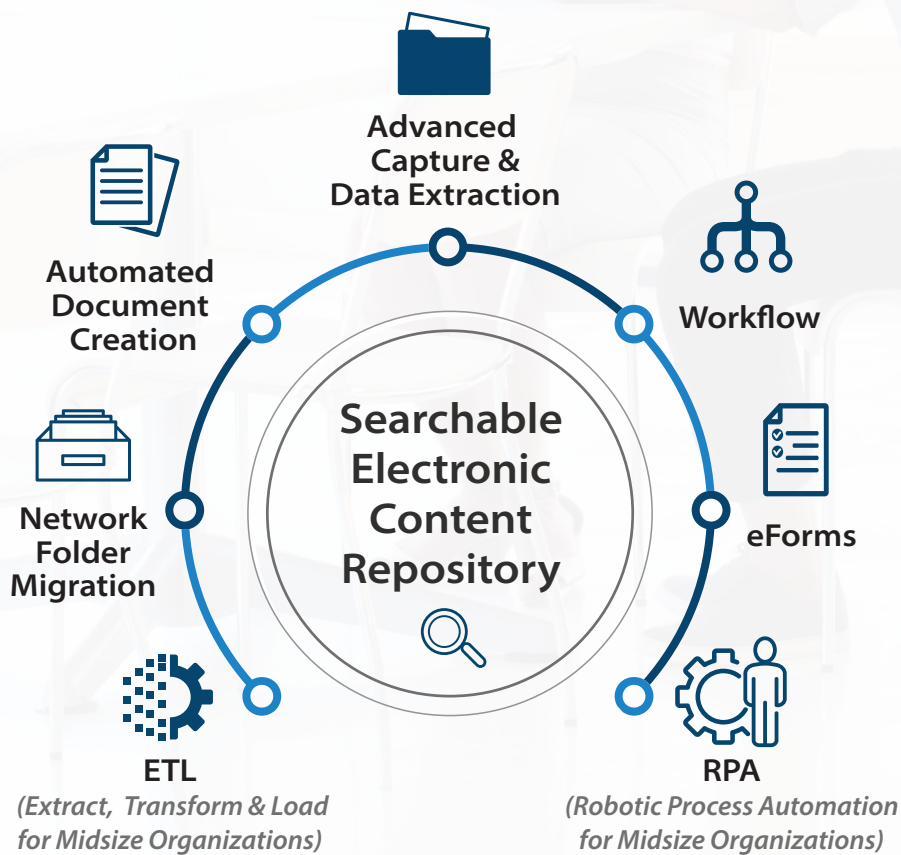
DocRecord's all-inclusive platform provides extensive capabilities not found in other ECM applications. It enables organizations to automate and significantly improve their business, accounting and customer processes.

Platform Design Goal

Easy-to-use, powerful, and affordable data and document processing automation and transformation is the primary design goal of the DocRecord platform. For today's organizations, it's essential that both data and documents are easily and efficiently processed throughout an organization. That's why DocRecord provides so many ways to automate these processes.

Platform That Grows With Your Organization

DocRecord's all-inclusive platform ensures that you have the automation and processing capabilities that can keep up with your organization's future growth.



DocRecord's all-inclusive platform provides organizations with the capabilities they need now and in the future. Priced simply by the concurrent user.

BENEFITS OF DOCRECORD ECM

Process & Access Work from Anywhere

Obtain instant remote access to your content from anywhere through multiple user interfaces including: Web, desktop, through Microsoft Outlook and other Office applications, and through third-party applications.

Automate Manual Paper-based Processes

Automate paper-based and manual business, accounting, and customer processes and realize substantial cost savings, processing efficiencies, and reduced processing errors.

Capture Data from Documents Automatically

DocRecord's data capture capability automatically recognizes documents, extracts and processes their data, performs database lookups, and automatically files them. Eliminate manual data entry.

Automatically Process eForms Data

Eliminate paper forms and manual data processing with eForms and automated processing. eForm data can be processed through workflows and routed to others for additional processing, eSigning, approvals, and more.

Eliminate Network Folders

Nearly all midsize organizations have numerous network folder systems where documents are siloed. DocRecord enables the rapid and easy subsumption of these multiple network folder systems allowing security and organization.

Automatically Create Personalized Documents

DocRecord can create complex personalized PDF communications within its workflow. These personalized communications can include highly variable data from multiple data sources and create charts on-the-fly.

Common Problems Solved

DocRecord solves these and other common business process problems:

- » Eliminate paper-based processes in your organization
- » Provide instant access to documents & content
- » Replace paper forms & processes with eForms & electronic workflows
- » Provide business process automations
- » Enables remote working and data/document workflows
- » Automate accounting AP & AR processes
- » Automate HR processing such as onboarding
- » Automate data extraction from scanned & electronic documents
- » Eliminate manual data entry
- » Eliminate network folder systems
- » Automate repetitive processes

KEY NEW CAPABILITIES IN DOCRECORD V7

- » Document-centric ETL (Extract, Transform, Load) for Midsize Organizations
- » Document-centric RPA (Robotic Process Automation) for Midsize Organizations
- » Expansion of ETL | RPA capabilities to connect to Prism WorkPath REST API connector
 - » Enables seamless RESTful API bidirectional transfer of data with third-party applications
- » New redesigned Web Client with workflow actions & more
- » Updated eForms Designer & capabilities
- » Updated Workflow Designer & capabilities

PROCESS WORK FROM ANYWHERE

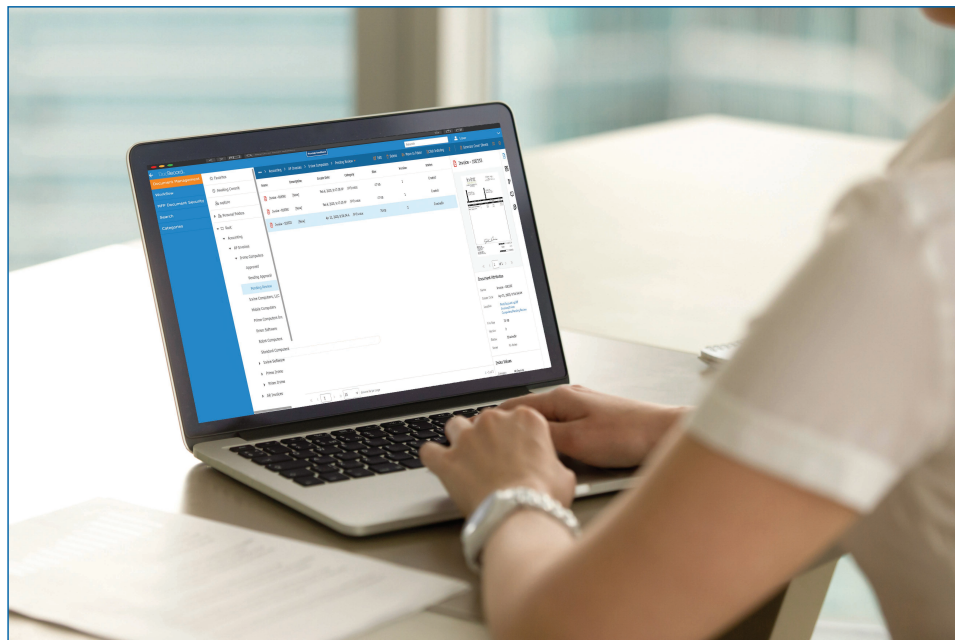
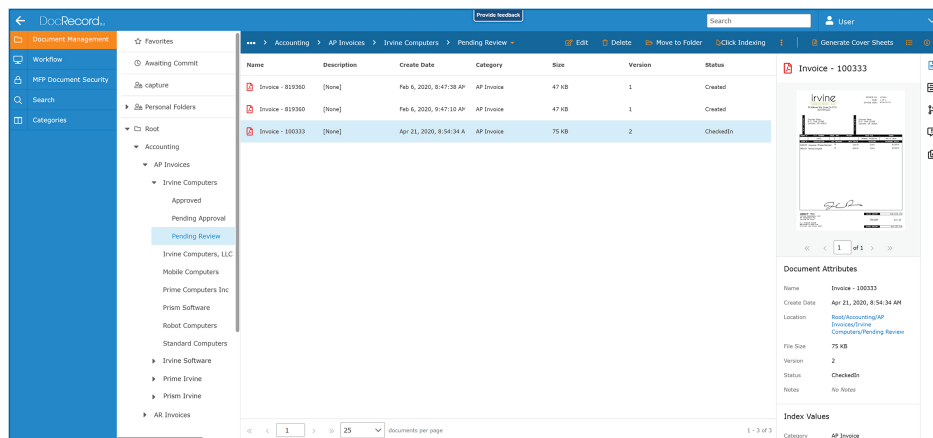
Organizations need to provide their employees with ways to electronically process their work and access their documents from anywhere and at any time. Instant and secure access to documents, content, and data workflows is essential. And, they need this access from nearly any device. DocRecord provides this ability.

Enable Mobile, Dynamic and Flexible Working

With access from anywhere, DocRecord users can stay a part of the organization's critical workflow. Users can access, retrieve, and deposit records into DocRecord folders. They can also access and process their workflow tasks. Using Web Client, users can annotate PDFs and process documents.

Browser-based web and mobile document archiving, retrieval and processing are easily enabled with features such as:

- » Document Retrieval & Processing
- » Quick & Intelligent Searching
- » Workflow Integration & Processing
- » Document Preview
- » Indexing and Metadata
- » Annotation & PDF Document Markup



Enable mobile and dynamic working with DocRecord Web Client

AUTOMATE MANUAL PROCESSES

Midsized organizations work with a lot of documents and data from those documents. DocRecord can easily and automatically process those documents and the resulting data. This enables an organization's easy transformation from manual processing to automation.

Business Process Automation

DocRecord enables easy and powerful workflow and process automation for business processes, eForms, data, and documents. Create a wide range of easy-to-complex workflows and automations containing conditional test, eSigning, approvals, and much more.

ETL: Extract, Transform and Load

DocRecord's ETL function allows a wide range of document manipulation, conversion, and correction prior to actual data extraction - capabilities not found in standard ECM workflows. Once key data is extracted it can be automatically processed.

RPA: Robotic Process Automation

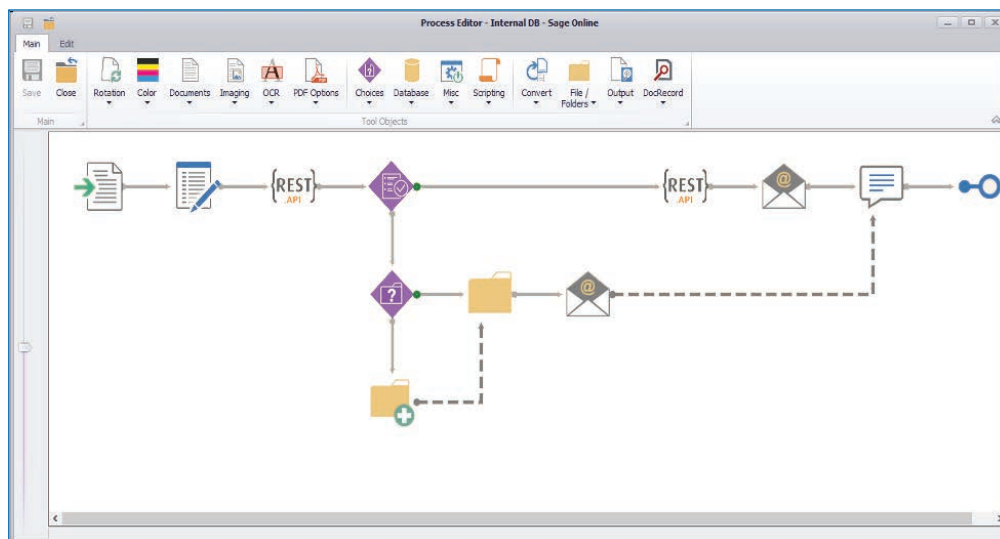
DocRecord's RPA function allows a wide range of task and data automation - capabilities not found in standard ECM workflows. This enables organizations to easily build complex task processes that automate repetitive manual processes, data processing, and error checking.

AUTOMATE THESE DOCUMENT-CENTRIC PROCESSES

- » Eliminate repetitive, manual processing tasks
- » Modifying data from scanned documents
- » Manual review of paper forms
- » Manual document conversion and filing
- » Verifying document and data before archiving
- » Validate database matching of data
- » Manual data input into databases

BENEFITS OF PROCESS AUTOMATION

- » Improve efficiencies
- » Reduce costs
- » Eliminate user errors
- » Accelerate processing times
- » Increase productivity
- » Increase customer satisfaction



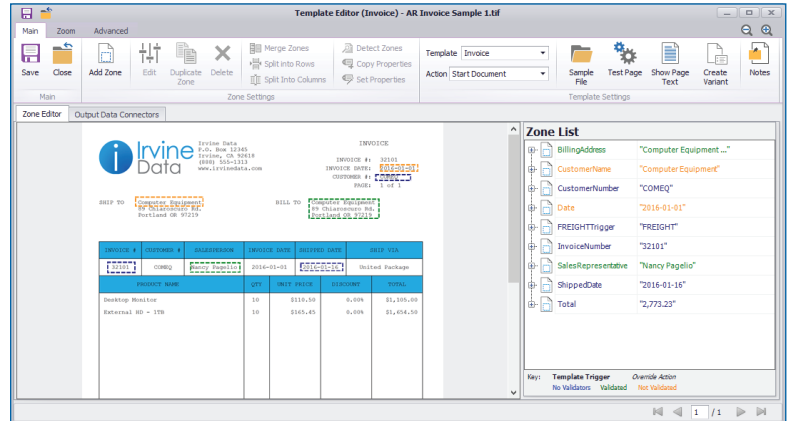
Easily build ETL & RPA document & data automating processes

AUTOMATED CAPTURE & INTELLIGENT EXTRACTION

DocRecord provides a powerful data capture capability that allows documents to be automatically recognized, have data extracted, and be automatically processed and filed.

Document Templates

DocRecord enables building of complex templates to recognize and extract all types of data from a wide range of documents such as invoices, statements, and many more. Templates can be built that allow document information (metadata) to be automatically and dynamically recognized and extracted based on known text triggers - such as the words "Total" or "Customer" - or on data patterns within a given document type such as an invoice or check.

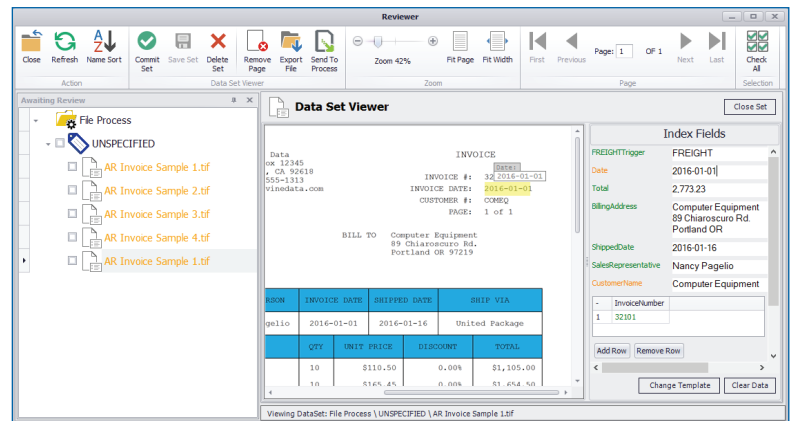


Document Templates: Easily create numerous zonal-based templates to quickly process your documents

Line-Item Data Extraction

Documents often contain detailed information within the document. This detailed information - line-item data - can also be recognized and extracted.

This extracted data can be automatically compared for a data match to a database and data exceptions can be either approved or corrected by a person reviewing the information.

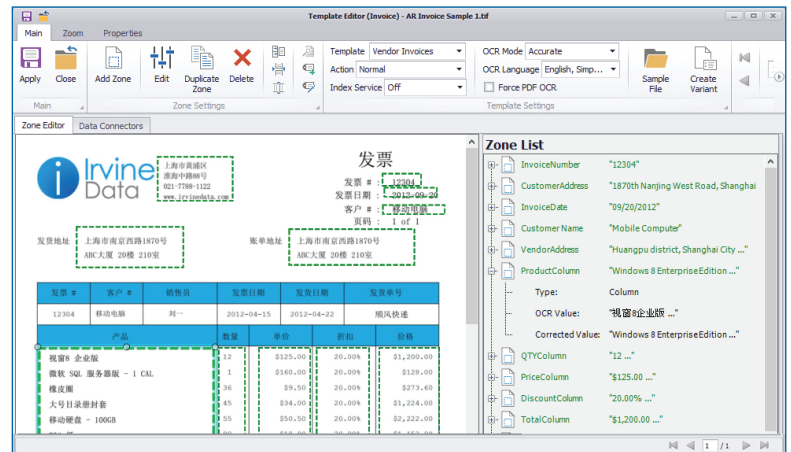


Click Indexing: Simply mouse-over any text on the page and the metadata is automatically set

This allows organizations to eliminate manual keying of critical data into other applications such as accounting or ERP.

Click Indexing

Continue to improve operational efficiency by using Click Indexing which enables the user to simply "mouse-over" any text on the page and, with a mouse click, add that value to the set of extracted data.



Translation: Automatically translate extracted data into over 60 different languages*

*Microsoft Azure account is required

Automatic Translation

DocRecord's Capture can automatically translate the extracted data into 60 languages. It does this through Microsoft Translator, a Microsoft Azure service which the user sets up separately. The benefit of automatically translating data is that it saves time over manually translating line-item data.

AUTOMATICALLY PROCESS EFORM DATA

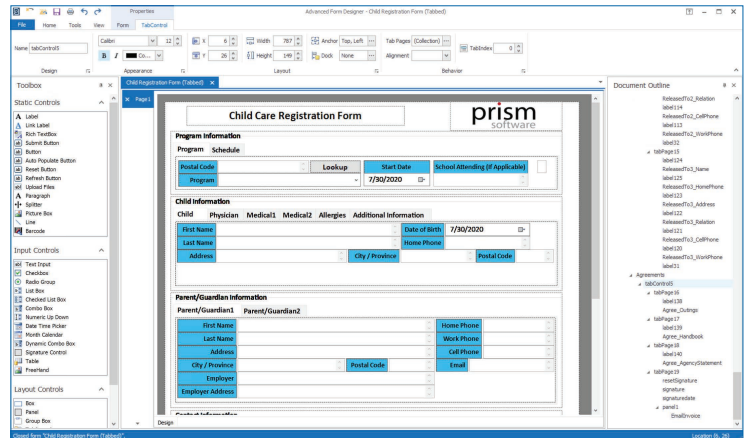
Replace Paper Forms

Easily replace paper forms and manual processing with easy-to-design eForms and automated processing. Build a wide range of different form types to collect & process data from both mobile and desktop platforms.

Automated Forms Creation with eForms

With DocRecord's eForms capability, organizations can build a wide range of eForm types to collect data from mobile and desktop platforms. The eForm data can be processed through workflows and routed to others for additional processing, eSigning, approvals and more.

eForms vary widely by purpose, type, complexity, and display platform. DocRecord's eForm Designer provides a user interface to quickly design and preview your complex eForm. Quickly build a library of different types of eForms for collecting and processing data.



Quickly design and preview complex eForms using DocRecord eForm Designer

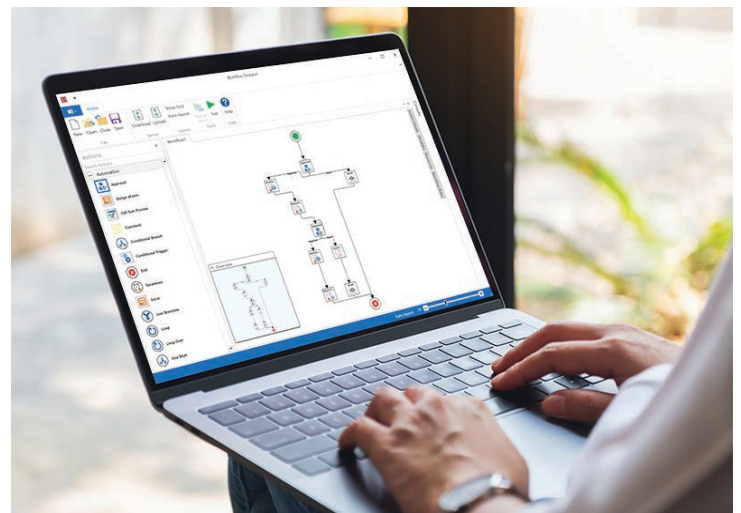
ELIMINATE NETWORK FOLDERS

Eliminate Document Orphaning & Siloing

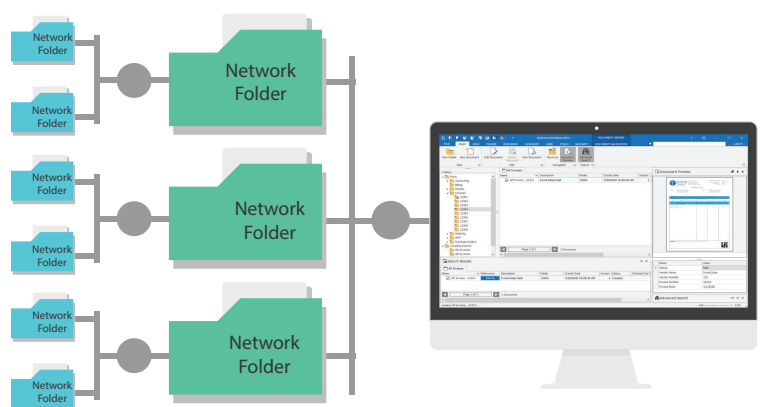
Nearly all midsize organizations have numerous network folder systems where documents may be orphaned and siloed. DocRecord enables the rapid and easy subsumption of these multiple network folder systems allowing security and document organization.

The organization's existing network folder system can be accessed through DocRecord. It does this by duplicating and then subsuming all the folders and files in the network folder system. Your network folder system is duplicated within DocRecord.

Any new files created outside of your new DocRecord folder migration can also be imported into DocRecord. All imported folders and its documents have all the DocRecord features such as advanced security, check-in and check-out, audit trail, versioning, retention policies, and much more.



Easy-to-build workflows using drag-and-drop user interface to customize processes



Easily & quickly include network folder systems and siloed documents into DocRecord's archiving & security

AUTOMATICALLY CREATE PERSONALIZED DOCUMENTS

Personalized Document Creation in Workflow

DocRecord enables the automated creation of complex personalized PDF communications. These personalized communications can include highly variable data from multiple data sources. It can also create personalized items such as one-off charts and graphs, images, coupons, offers, barcodes, and messaging.

Documents created include statements and invoices, customer notifications, letters, delivery instructions, special offers, promotions, booklets, and much more.

These highly personalized documents are created from, and part of, a Workflow process and its data. These documents can be multi-page, and document white sectioning and multi-page flowing are automatically controlled.



Create highly personalized variable data-driven complex communications with charts, graphs & more

FOR ALL INDUSTRIES

- » Healthcare
- » Education
- » Government
- » Legal
- » Defense
- » Manufacturing
- » Banking | Finance
- » Insurance
- » Distribution
- » Services
- » Property Management
- » Technology & More

FOR ALL DEPARTMENTS

- » Accounting
- » Finance
- » HR
- » Legal
- » Manufacturing
- » Distribution
- » Operations
- » Marketing | Sales
- » Warehouse | Shipping
- » Services & More

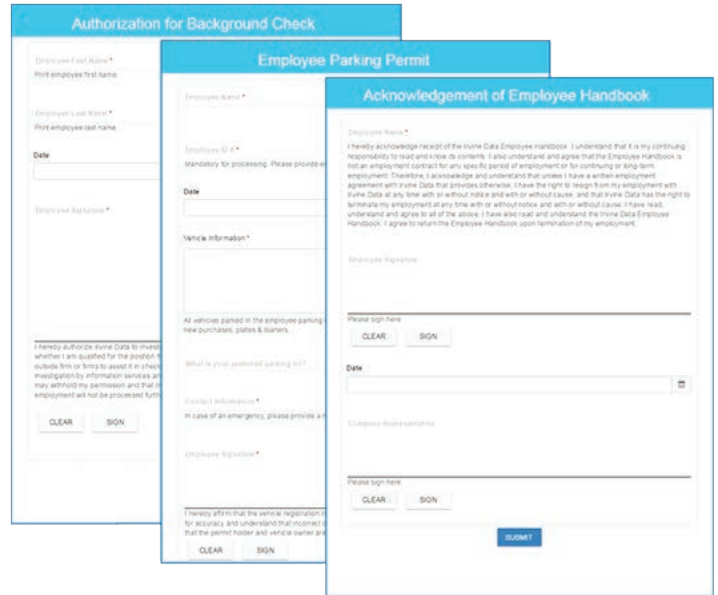
PUBLIC EFORMS MODULE

Public eForm Access on Websites

DocRecord can also optionally create eForms for placement on an organization's public website. The value of this capability is it allows for the collection of data from non-employees - such as clients and patients - through an eForm. This data collected from the public eForm is then sent through DocRecord's workflows for automatic processing.

The value of a public eForm is that it allows for remote data collection and processing. Examples of public eForms include: Submission of HR resumes and supporting documents, data collection and remote document uploading, submission of patient or student data, submission of documents and data prior to an appointment, submission of liability waivers, and much more.

The Public eForms module is not part of the core DocRecord all-inclusive platform. However, it is both inexpensive and easily added to the all-inclusive platform.



Publish and automatically process HR eForms using Public eForms modules



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