


docuflow integrates business application systems with various document management repositories. Its core functionalities are designed to streamline and automate document-centric processes both inside and outside of your business application environments and provide end-users a better and more efficient experience that saves costs across the enterprise.

Common Use Cases	Core Functions	Advanced Functions	Supported Technology
Migrations	docuflow facilitates migration of content between repository systems, ensuring data integrity and minimizing downtime.	Advanced migration processes can include: -automated folder creation, -transformation of documents, -transformation of metadata, and -permissions management. For SAP attachment migrations, this may include your SAP database & addresses attachment relinking within SAP.	<u>Enterprise Business Applications</u> SAP ECC SAP S/4HANA Cloud Private SAP S/4HANA Cloud Public (Q3/24) SAP SuccessFactors Custom <u>Roadmap Candidates</u> Coupa ServiceNow Salesforce WorkDay Oracle Financials Oracle NetSuite Please let your Customer Success Manager know your product enhancement requests so they may feed into roadmap selection process.
Recurring File Transfers	docuflow automates high-volume file transfers to ensure timely content delivery and metadata updates that reduce manual workloads.	File Transfers can include scheduling and: -custom content transformations -automated folder creation & metadata transformation -bi-directional synchronization -initiation of 3rd party workflow routing and queues.	
Document Generation Archiving	docuflow captures and files document output such as sales invoices, statements and other print streams so end-users have efficient & secure access from anywhere.	Solutions vary by customer need but often include: -link SAP message output to an SAP transaction -transform, split and index files -underlay data with formatted templates -conversion of text to structured data	
Outbound Attachment Archiving	docuflow archives documents attached within business applications (ex SAP), replacing them with secured links, resulting in a better user experience and reduced sustainment costs.	document storage processes can include: -automated folder creation -filing intelligently into existing folder structures -metadata transfer in realtime from business applications -initiation of workflow tasks, processes or notifications	
Inbound document Linking	docuflow intelligently links documents stored directly in repositories to business app(s) (ex SAP) saving users time with in-app access.	Linking processes can be triggered with minimal metadata and also include: -refiling documents from a dropzone folder or portal -synchronization of metadata from business app to the stored document -initiation of in-app or 3rd party workflow processes -linking to more than one business app or object (one to many)	

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Enhanced In-app document management experience	docuflow enhances document management experiences within a business app regardless of where it is stored, making it easier & faster for users to manage, organize & retrieve content.	docuflow's DocManager user experience follows business app standards so it is intuitive for users. The solution can include: -access to upstream/downstream content within bus. object (VirtualLinking) -access to task and process queues -user functions within one multi-tab screen -drag and drop or upload from file system -multi-faceted document organization and sorting capabilities	<u>Content Repositories & Ecosystems</u> Box AWS S3 Microsoft SharePoint Online Microsoft SharePoint On-prem Microsoft Syntex & Power Platform IBM FileNet IBM BACSoC IBM CM8 (Q4/24) IBM CMOD (Q2/25) Opentext Documentum IDOX Fusion Elastic Search File Systems Secured FTP SAP CMIS (Q2/24) SAP ILM (Q3/24) Crawford Operations Express Custom <u>Roadmap Candidates</u> Azure Blob Storage Google Cloud Storage Google Drive Systemware ELO Hyland Onbase Alfresco Please let your Customer Success Manager know your product enhancement requests so they may feed into roadmap selection process.
Bi-directional Data Synchronization	docuflow automates metadata & data synchronization with business apps and repositories or 3rd party systems making it faster and easier to retrieve & take action on documents.	Metadata & data synchronization are key for automating task and process triggers, often requiring: -updates to one or more document metadata fields -use of document metadata to populate business objects within an app	
List Synchronization	docuflow synchs business object data or master data, ex. cost centers, to repository pick lists, saving users time & driving higher quality via document controls.	Where supported and business appropriate, a docuflow list synch can: -feed SharePoint lists -feed repository choice-lists/pick-lists -export to a csv, xml or json format for consumption by 3rd party apps	
Data Archiving	docuflow supports SAP ADK data archiving, which is a known good practice to keep your application databases trim, performant and low cost.	ADK data archiving is initially configured for one or more business objects within SAP. Once configured in SAP, using docuflow to store the data archive objects within your repository is easy and quick with straightforward configuration.	
Task & Process Workflow Automation	docuflow automation leverages built-in business application or repository workflow engines to automate document centric tasks and processes helping users save time and organizations reduce costs.	Document centric workflows are used by customers to automate repetitive tasks and business processes such as document approvals, notifications, and data entry. Examples include: -purchase order acknowledgements -journal entry requests & approvals -vendor onboarding & approvals -employee onboarding requests -warranty and dispute claims	
Governance & Compliance	docuflow enables Information Lifecycle management (ILM) compliance and integrity ensuring systematic, consistent & auditable governance processes for documents.	docuflow capabilities include: -metadata updates to trigger compliance and governance policies -in-place lifecycle management of content in repositories and data in line of business systems -bi-directional flow of metadata between application and repository	

<div> <div>  </div> <div> <h1>Prepackaged Add-on Solutions</h1> </div> </div>			
Prepackaged Solutions	Core Functions	Advanced Functions	Supported Technology
docuflow for SuccessFactors	docuflow extends SuccessFactors for centralized HR document management and governance using a repository of your choice that will drive better compliance and more efficient processes for HR business partners, managers and employees.	Using the docuflow - SuccessFactors integration, organization's can: <ul style="list-style-type: none"> -create a single consolidated digital employee file -include a “Document search” function for HR & Business Managers -provide employees with efficient employee self service (ESS) -adhere to SuccessFactors Role Based Permissions (RBP) access -keep users within the SuccessFactors user experience 	SAP SuccessFactors (most modules)
docuflow Advanced SAP DMS/DIRs	docuflow automates inbound linking, creation and versioning of SAP DIRs for SOP's, drawings and more, saving time for users and ensuring the most comprehensive approach to document control within SAP.	docuflow's extended SAP DMS allows for Document Information Record (DIR) automation of: <ul style="list-style-type: none"> -outbound archiving of DIR attachments and metadata to a repository -inbound attachment of controlled documents to a DIR -New DIR creation -DIR versions and DIR updates -DIR attachment to a business object -Customer workflow initiation inside or outside of SAP 	SAP DMS
docuflow Accounts Payable for SAP	docuflow provides an automated SAP centric supplier invoice processing system to eliminate manual data entry and improve accuracy in AP processes, resulting in lower invoice processing costs and reduced cycle times.	docuflow is a fully integrated, intelligent SAP accounts payable system that digitizes and automates supplier invoice processing from the moment it arrives through to the end of its life cycle, enabling: <ul style="list-style-type: none"> -automatic ingestion and interpretation of invoice header details & more -orchestration of workflow including exceptions and approval rules -automatic capture and archive of SAP output such as payment vouchers and vendor notifications 	SAP Finance & Control
docuflow AuditLink	docuflow's document bundling & reporting system for audit, disputes and other use cases simplifies the process and significantly reduces time for users to collect and present supporting documents.	All organizations are subject to audit, compliance & dispute management. Assembling and preparing supporting documents can be a long and arduous process. docuflow can: <ul style="list-style-type: none"> -automatically tag documents at ingestion for relevant transactional data -automatically collect and bundle related documents -embed document counts and links within your reports -share content securely inside and outside your organization 	SAP Finance & Control