

docuflow[®]

BY **VERSAFILE**

Use Cases & Solutions Catalogue

Streamline and Automate Document-Centric Processes Across Your Enterprise with VersaFile HyperConnected Content™



SAP Certified
Integration with SAP S/4HANA

SAP Certified
Built with SAP Business Technology Platform



Migrations



Recurring File Transfers



Inbound Document Linking



Document Generation Archiving



Outbound Attachment Archiving



Bi-Directional Data Synchronization



List Synchronization



Data Archiving



Governance & Compliance



Enhanced In-App Document Management Experience



Task & Process Workflow Automation

docuflow: Use Cases at a Glance

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



Migrations

docuflow facilitates migration of content between repository systems, ensuring data integrity & minimizing downtime.

Advanced Functions:

Advanced migration processes can include:

- ✓ Automated folder creation
- ✓ Transformation of documents
- ✓ Permissions management

For SAP attachment migrations, this may include your SAP database & addresses attachment relinking within SAP.



Recurring File Transfers

docuflow automates high volume file transfers to ensure timely content delivery & metadata updates that reduce manual workloads.

Advanced Functions:

- ✓ Scheduling
- ✓ Custom content transformations
- ✓ Automated folder creation & metadata transformation
- ✓ Bi-directional synchronization
- ✓ Initiation of 3rd party workflow routing & queues




Inbound Document Linking

docuflow intelligently links documents stored directly in repositories to business app(s) (ex SAP) saving users time with in-app access.

Advanced Functions:

- ✓ Triggered with minimal metadata
- ✓ Refilling documents from a dropzone folder or portal
- ✓ Synchronization of metadata from business app to the stored document
- ✓ Linking to more than one business app or object (one to many)




Document Generation Archiving

docuflow captures & files document output such as sales invoices, statements & other print streams so end-users have efficient & secure access from anywhere

Advanced Functions:

- ✓ Triggered with minimal metadata
- ✓ Link SAP message output to an SAP transaction
- ✓ Transform, split, & index files
- ✓ Underlay data with formatted template
- ✓ 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 & reduced sustainment costs.

Advanced Functions:

- ✓ Automated folder creation
- ✓ Filing intelligently into existing folder structures
- ✓ Metadata transfer realtime from business applications
- ✓ Initiation of workflow tasks, processes or notifications

Supported Technology

Enterprise Business Applications

SAP ECC, SAP S/4HANA Cloud Private, SAP S/4HANA Cloud Public (Q3/24), SAP SuccessFactors, Custom

Roadmap Candidates

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.



Bi-Directional Data Synchronization

docuflow automates metadata & data synchronization with business apps & repositories or 3rd party systems making it faster & easier to retrieve & take action on documents.

Advanced Functions:

Metadata & data synchronization are key for automating task & 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 syncs business object data or master data, ex. cost centers, to repository pick lists, saving uses time & driving higher quality via document controls.

Advanced Functions:

Where supported & business appropriate, a docuflow list sync 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 & low cost.

Advanced Functions:

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 & quick with straightforward configuration.



Governance & Compliance

docuflow enables Information Lifecycle management (ILM) compliance & integrity ensuring systematic, consistent & auditable governance processes for documents.

Advanced Functions:

- ✔ Metadata updates to trigger compliance & governance policies
- ✔ In-place lifecycle management of content in repositories & data in line of business systems
- ✔ Bi-directional flow of metadata between application & repository



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.

Advanced Functions:

- ✔ Access to upstream/downstream content within business objective (VirtualLinking)
- ✔ Access to task & process queues
- ✔ User functions within one multi-tab screen
- ✔ Drag & drop or upload from file system
- ✔ Multi-faceted document organization & sorting capabilities



Task & Process Workflow Automation

docuflow automation leverages built-in business application or repository workflow engines to automate document-centric tasks & processes helping users save time & organizations reduce costs.

Advanced Functions:

- ✔ Purchase order acknowledgments
- ✔ Journal entry requests & approvals
- ✔ Vendor onboarding & approvals
- ✔ Employee onboarding requests
- ✔ Warranty & dispute claims

Supported Technology

Enterprise Business Applications

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

Roadmap Candidates

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.

Prepackaged Add-On Solutions

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.

Advanced Functions: Using the docuflow - SuccessFactors integration, organization's can:

- ✔ Create a single consolidated digital employee file
- ✔ Adhere to SuccessFactors Role Based Permissions (RBP) access
- ✔ Include a 'Document Search' function for HR & Business Managers
- ✔ Keep users within the SuccessFactors user experience
- ✔ Provide employees with efficient employee self service (ESS)

Supported Technology: 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.

Advanced Functions: docuflow's extended SAP DMS allows for Document Information Record (DIR) automation of:

- ✔ Outbound archiving of DIR attachments and metadata to a repository
- ✔ DIR attachment to a business objective
- ✔ Inbound attachment of controlled documents to a DIR
- ✔ Customer workflow initiation inside or outside of SAP
- ✔ New DIR creation
- ✔ DIR versions and DIR updates

Supported Technology: SAP DMS

docuflow for 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

Advanced Functions: 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:

- ✔ 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

Supported Technology: 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.

Advanced Functions: All organizations are subject to audit, compliance & dispute management. Assembling and preparing supporting documents can be a long and arduous process. docuflow can:

- ✔ Automatically tag documents at ingestion for relevant transactional data
- ✔ Embed document counts and links within your reports
- ✔ Automatically collect and bundle related documents
- ✔ Share content securely inside and outside your organization

Supported Technology: SAP Finance & Control