



# PSIsafe 12

## Document Management Suite

You're 542 lines into that last spreadsheet of that TPS report. Despite shuffling through 6 filing cabinets, you still can't seem to locate that final document for that last line in the report.

That lackluster temp that was here last week pops to mind and you try not to place blame amidst the frustration. It doesn't have to be this way. Let's talk a little about Document Management and how PSIsafe can help you work the way you want.



Cloud



On-Premise



Web



Mobile

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# Work the way you want with PSIsafe.

**Competitively priced, secure, truly scalable & versatile, PSIsafe is the ideal document management solution for any organization.**

Document Management is a fancy way of saying **a system to keep track of your files and documents**. As the rate of digitalization continues to grow, the value of having your files and documents at your fingertips becomes apparent. Even though there are default file browsers in our computers, it would be nice if they could::

- ▶ Be accessible from anywhere.
- ▶ Be able to index specific document information for quick reference.
- ▶ Have a workflow system that matches your current document processes.
- ▶ Have built in e-signature capabilities is the most used e-sign company in the world DocuSign.
- ▶ Have an OpenAPI allowing for easy connection to programs like Salesforce.
- ▶ Use secure encryption to share documents with external persons.
- ▶ Create a set of pre-defined documents for a folder.
- ▶ Let people only see what they need to.

PSIsafe Document Management software does ALL that and a lot more. Simply tell PSIsafe what kinds of files you want to keep track of (.docx, .pdf, .xlsx, .jpeg, etc.,) what program to use when opening it, and what parts of that document are the important bits (Document Indexing) and then we take care of the rest. Backing up is easy whether you're On-Premise (PSIsafe on your servers) or Cloud (PSIsafe on our servers.)



## Let's Talk Important Bits

Gone are the days of having to keep a record of all the file name schemes you had to come up with to be able to find it later. Instead, we take that information and attach it to the file itself (using Document Indexes) as additional file information, also known as metadata. Metadata for your documents is all the information within and about that document. Some examples of this information include:

- ▶ Names
- ▶ Addresses
- ▶ SSNs
- ▶ Invoice Numbers
- ▶ Invoice Totals
- ▶ Hiring Dates
- ▶ Governance Information
- ▶ And so much more!



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By “tagging” documents with indexes, it enables our users to easily search for date ranges, price ranges, invoice number ranges, and much more—in a matter of seconds. No more spending hours at the filing cabinet, leaving you feeling like the Hunchback of Notre Dame at the end of the day. Document Indexing relieves you of the worry of whether that filename was correct by attaching the information to the document where it belongs. We know where all the information ends up, but how do we get it where it needs to go?

## Let Our Workflow Do The Work

It's important your documents get processed in an accurate and timely manner. PSIsafe Workflow can take your document, route it to the right person for feedback (including approvals, emailing, or other various actions), and file it in the predefined folder. With document-level metadata, you can route those based on individual document data like name, date, invoice number, ID, specific text, and much more.

To help even further with workflow, users can implement PDF forms to automatically create documents you need. Workflow items are available to view on your dashboard giving you easy access to statuses of documents and where trouble might come up. We know you have enough to do and as technology advances, we want to help.

## e-Signing is Now a Standard

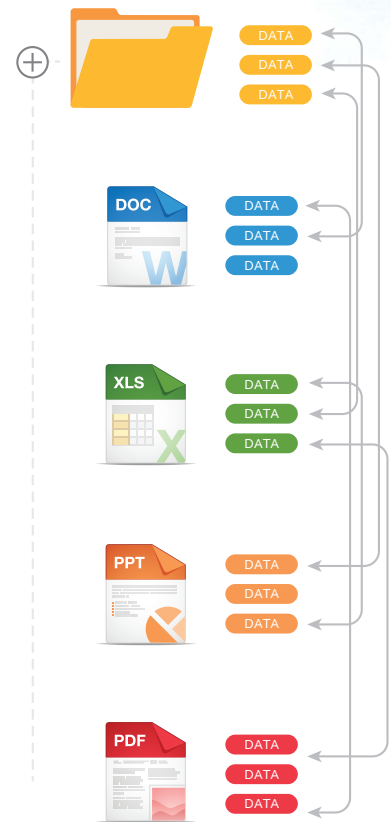
Remember when your doctor didn't hand you an e-tablet to sign in? With remote work growing exponentially, it was only a matter of time before the “nice-to-have” e-signature option in a software suite became the “need-to-have” option. PSIsafe allows users to connect to their own DocuSign account to process documents all within the app. Whether it's an individual document or package, our DocuSign integration lets you store and sign documents with ease.

## Privacy is Our Policy

“Safe” is in the name for a reason. PSIGEN takes information security, governance and compliance very seriously. Securing the application itself is only a piece of the overall information security posture. Thus, PSIGEN invests heavily in a programmatic approach to secure your data, ensuring the availability of the service and protecting privacy and confidentiality at every step.

## Work the Way You Want

PSIsafe can help keep your documents secure and at your fingertips using document indexing, advanced searching, workflow for accurate document handling, and e-signatures. Spend less time worrying and working, so you can spend more time connecting and innovating. Let us show you how to work the way you want with our PSIsafe Document Management Suite.



## Metadata Magic

Harnessing information gleaned at the Document level as well as in the Folder structure allows PSIsafe to retrieve documents based not only on external data such as filename or date created, but also on data about or even contained within the document.

Such metadata, that we call “Document Level Indexing” allows retrievals of documents at a previously unheard-of level of accuracy and relevance.

**Fast Retrieve = saved profit.**

# PSIsafe Selected Features

## Share



Share is a cloud-based subscription service that allows PSIsafe users to post documents in an end-users Share folder. End users have their own password and can access and manage shared documents via a standard browser interface or via PSIsafe Cloud.

## eSignature



PSIsafe eSignature simplifies the process of securely collecting electronic signatures. Documents are sent directly from PSIsafe to your DocuSign® service allowing users to send individual or packaged documents.

## Retriever



With Retriever, you can access and use your documents from your ERP, CRM or other mission-critical system while maintaining PSIsafe's audit trail, version control and security functionality.

## Synchronizer



Synchronizer automatically syncs PSIsafe repositories with outside systems of record. Changes made in third-party applications and databases are automatically made in PSIsafe.

## Web Integrations



PSIsafe's highly-extensible framework is designed to ease document-intensive processes, creating real-time sync between PSIsafe document repositories and powerful CRMs such as Salesforce®.

## Software & Hardware Requirements

For more information on the requirements for running PSIsafe, please visit our Support Portal at <https://support.psigen.com/hc/en-us/articles/360028780152-PSIsafe-System-Requirements>

## About PSIGEN Software, Inc.



Unleash the power of your people by eliminating data entry with business automation technology from PSIGEN. Implemented by a global network of integrators, PSIGEN paves the way for your digital transformation in four steps: on-ramp your information from paper and email attachments with PSIsafe advanced capture software; automate workflows with PSIsafe document management software; integrate these documents so they are available and searchable in software you use daily (ERP, CRM, HCM); and make better decisions faster as a result – with a positive ROI faster than you may think. Work the way you want, let technology do the rest.

It's your company, your culture—we adapt to you.

Work the way you want with PSIGEN.