

# Kofax PSIsafe 12 Document Management Suite

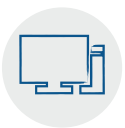
Still shuffling through filing cabinets to locate important documents?

It doesn't have to be that way.

Document management and Kofax PSIsafe can help you work the way you want.



Cloud



On-Premises



Web



Mobile



## Work the Way You Want with PSIsafe.

Competitively priced, secure, truly scalable and 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 more apparent than ever. Even though computers have default file browsers, it would be nice if they could:

- Be accessible from anywhere
- Index specific document information for quick reference
- Have a workflow system that matches your current document processes
- Have built-in e-signature capabilities
- Have an OpenAPI for easy connection to programs such as Salesforce
- Use secure encryption to share documents externally
- Create a set of pre-defined documents for a folder
- Let people only see what they need to

# KOFAX



## PRODUCT SUMMARY

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 those files and what parts of those files are the most important (document indexing). Then, PSIsafe takes care of the rest. Backing up is easy whether you're on-premises (PSIsafe on your servers) or cloud-based (PSIsafe on our servers).

### Find Your Way with Metadata

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 files later. Instead, we take that information and attach it to the file itself (using document indexes) as additional file information. It's called metadata, and it contains all the information within and about that document. Some examples include:

- Names
- Addresses
- SSNs
- Invoice numbers
- Invoice totals
- Hiring dates
- Governance information

### File Not Found? Not Anymore!

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

By "tagging" documents with indexes, users can easily search for date, price and invoice number ranges, and much more in a matter of seconds—no more spending hours at the filing cabinet. 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 actions), and file it in a predefined folder. With document-level metadata, you can route based on individual document data such as 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 document status and any potential trouble spots.

### E-Signing Is Now a Standard

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 account to process documents via integrated e-signature app. Whether it's an individual document or package, you can store and sign documents with ease.

### Privacy Is Our Policy

"Safe" is in the name for a reason. We take information security, governance and compliance very seriously. Securing the application itself is only a piece of the overall information security posture. That's why we invest 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

PSIsafe harnesses information gleaned at the document level as well as in the folder structure. This 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, what we call "Document Level Indexing," allows retrievals of documents at a previously unheard of level of accuracy and relevance.

**Fast Retrieval = Saved Expense.**



### PSIsafe Selected Features

#### Share

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

#### E-Signature

PSIsafe E-Signature simplifies the process of securely collecting electronic signatures. Documents are sent directly from PSIsafe to our integrated e-signature service, allowing users to send individual or packaged documents.

#### Retriever

With Retriever, you can access and use 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>



### About Kofax

Kofax enables organizations to Work Like Tomorrow™—today. Kofax's Intelligent Automation software platform and solutions digitally transform document intensive workflows. Customers realize greater agility and resiliency by combining our process orchestration, cognitive capture, RPA, output management, analytics and mobile capabilities to speed time-to-value and increase competitiveness, growth and profitability while mitigating compliance risk.

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For more information, visit [kofax.com](https://kofax.com).

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