



Xerox® DocuShare® Flex Content Management Platform

Secure Cloud Sharing and Configurable Solutions

xerox[™]

Cloud-Based Content Management Platform to Digitize, Transform and Automate Your Content

Companies today struggle to manage all the documents, content, and processes that drive their business – and for many organizations, that data is growing every year. Yet for a small to mid-sized business (SMB) or department, large enterprise systems are often inflexible, costly, and slow to implement. Explore a cloud solution that's straightforward and easily adapts to your business.

XEROX® DOCUSHARE® FLEX MAKES IT SIMPLE

Xerox® DocuShare® Flex Content Management Platform is a cloud-based software as a service (SaaS) application.

Designed to help SMBs and enterprise departmental teams easily manage and organize their business content and set up business rules to automate and drive common processes, it has the tools you need to help you manage your business effectively.

With its advanced capabilities, you can connect to line-of-business applications and create custom document types to support your unique departmental needs. Thanks to its cloud-based, intuitive design, deployment takes days, not months, and requires little to no IT support or employee training. Users can get started immediately.

Most importantly, DocuShare® Flex is highly scalable to meet changes in user numbers, storage space, and specific process requirements.

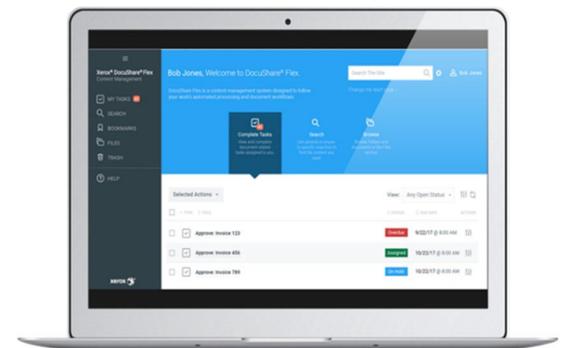
XEROX® DOCUSHARE® FLEX DELIVERS COMPREHENSIVE SOLUTIONS TO

- Digitally Transform Your Business
- Improve Your Business Processes
- Automate Document Processing & Workflows
- Solve Business Processing Challenges
- More...

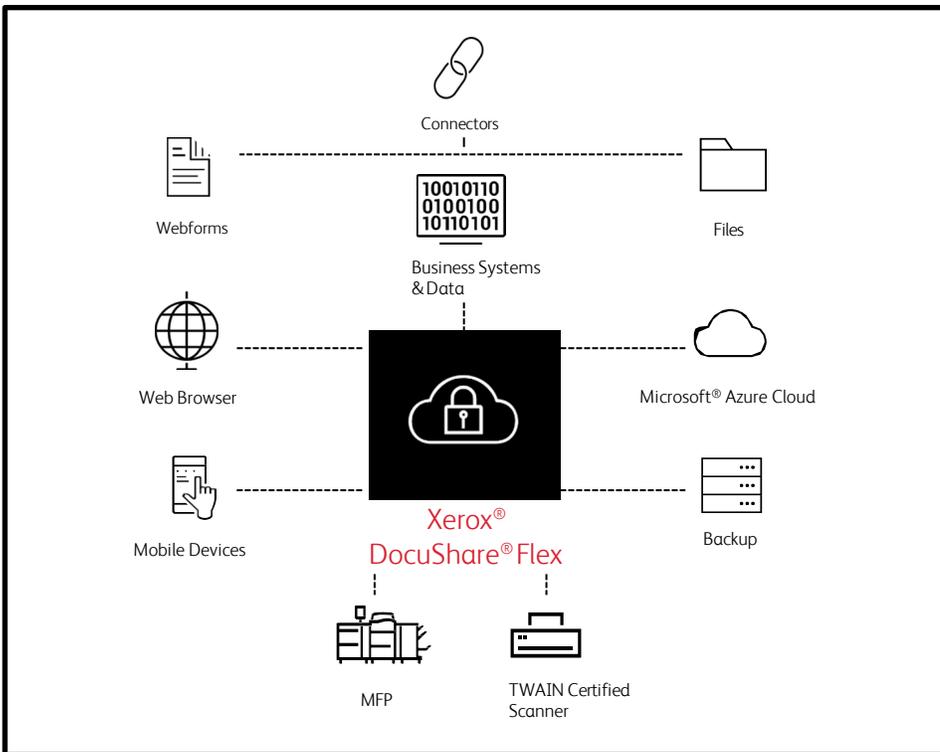


Xerox® DocuShare® Flex is the next-generation platform that carries over many aspects of the classic, award-winning DocuShare®.

- SaaS-based cloud delivery for quick adoption
- 100% web-based, updated user experience
- User-driven workflows that do not require costly professional services
- Higher scalability to grow with your business
- Extensibility to connect to your line-of-business systems, such as enterprise resource planning (ERP)
- Portability to save your business rules and reapply them in other departments
- Optional built-in user management
- Permission enhancements for elevated security



For the SMB or department, Xerox® DocuShare® Flex offers basic, intermediate, and advanced features to grow with your requirements.



KEY FEATURES AND FUNCTIONALITY

- Intuitive interface to promote adoption
- Scan instantly to a secure, shared cloud
- Document version control
- Multi-file drag-and-drop for fast upload
- Mobile-friendly interface and app
- Task assignment, escalation and management to align organizational content to your business processes
- Reporting to track activity and gain insights
- Integration with corporate directory services
- Connectors platform to integrate with ERP, CRM and other line of business systems
- Advanced security framework for governance and secure collaboration
- Easily created, fillable PDF forms
- Integrated web Capture
- Built-in OCR with full-text search capability to easily convert information to knowledge

MANAGE AND COLLABORATE

Xerox® DocuShare® Flex helps you categorize, store, organize and manage the full lifecycle of your business content in a secure central repository in the cloud. Employees manage their content through the intuitive interface where they can easily organize files.



Manage document properties, permissions, and tasks.



Assign tasks and manage employee workloads.



Email content as an attachment, zip file or URL or into a workflow.



Drive **collaboration** and support hybrid work environments.



Cloud access empowers workers to manage business content in DocuShare®, internally share links to content (rather than attachments)

CAPTURE AND INDEX

To tackle the massive flow of paper documents throughout your organization, Xerox® DocuShare® Flex boasts powerful features to capture and digitally transform.

Simple, easy scanning to the cloud:

- Ad hoc capture from Xerox® MFPs, or TWAIN-certified scanners
- Multi-file drag-and-drop upload of documents
- Barcoded separator sheets for batch scanning
- Scanning into workflows, files or individual folders – from on-site and off

Intelligent data extraction and image editing:

- Automatic, cloud-based OCR in all languages
- Smart Document Viewer with annotation, redaction and burn-in capability
- Database integration to auto-index properties
- De-skew, de-speckle, compression, rotation, and PDF export

Securely Access Content and Manage Its Lifecycle

Xerox® DocuShare® Flex enables organizations to digitize, transform, and automate business processes, empowering a better, smarter, faster and more productive work-anywhere workplace.

Automates the review, management, and disposition of crucial documents to help better ensure that the appropriate employees protect and retrieve the right documents at the right time. Create retention policies that automatically enforce the proper standard niche protocols and enable your business to comply more easily with current laws and regulations.

With Xerox DocuShare Flex, easily manage the lifecycle of documents® efficiently from when they are created or updated to when they are no longer needed or destroyed. Automates critical time-based events such as document aging and related actions like date-based reviews and expirations. You can automatically enforce and manage document lifecycle events, including release, periodic review, and document retention.

DOCUSHARE FLEX LIFECYCLE MANAGEMENT ENABLES ORGANIZATIONS TO:

- Automate retention and periodic content review to ensure it is current and compliant.
- Automate timed-based events such as publication or expiration.
- Change the state or visibility of content based on specific dates.
- Ensure that users focus on needed, current content.
- Extend the scalability and optimize the performance of your content management system.



EFFICIENT BUSINESS PROCESSING

Xerox® DocuShare® Flex boosts productivity through user-friendly routing tools and automated workflows:

- **Intuitive routing** helps you create and manage tasks and escalate for non-responses
- **Configurable task management** to categorize your processing tasks
- **Business rules** designed for business-level use let you quickly automate processes
- **Global business rules** work across all folders and teams
- **Automated periodic document** review and disposition policies make lifecycle management simple
- **Update external databases** through business rules
- **Business process automation** enabling solutions such as contract management, accounts payable, and HR onboarding

THE POWER OF THE CLOUD

In addition to easy configuration and setup and the ability to scale, the cloud frees your IT staff from the burden of inefficient administrative management.

Additionally, there's no need to worry about security. Xerox follows industry best practices in cloud security processes, procedures, technology, and physical measures—from encrypted user authentication to scheduled backups, off-site storage, and site replication—to ensure the safety and availability of our customers' data.

Transform Your Workplace, Driving Growth

PDF FORMS TO DIGITIZE AND AUTOMATE PROCESSES

AB9873

Files / AP Solution / PO Requisition / PO Save for Later / AB9873

print

Vendor Details

PO Details

Company Details

Account Code	Account Unit	Amount

PO Form

Description	Extended Price	Item Number	Quantity
BOSCH - 2018 EXCLUSIVE LES PAUL CLASSIC - Q12890.0		1	1
BOSCH - 2015 S3 STANDARD - TL CHERRY Serial 19940.0		2	2
Steinberg NUENDO 7 MULTIRACK SOFTWARE S4 1563.0		3	1
Neumann - SWITCHABLE STUDIO MICROPHONE 2740.0		4	1
Roland - RC-505 TABLE TOP LOOPER With EFFECT 858.0		5	1
Yorkville Sound 8D 01 DELUXE STUDIO 1040.0		6	1

Subtotal
12831.00

Tax

Freight

ATTACHMENTS

Supporting Doc Upload Choose...

Submit Save Cancel

Many processes in business use forms—yet paper forms are slow and inefficient. **PDF forms for Xerox® DocuShare® Flex** is an add-on that helps your organization go paperless and digital by letting workers capture information dynamically and on the fly, anywhere and from many devices in easy, fillable forms.

PDF forms capability can be designed by DocuShare Flex users using simple tools or templates, enabling workflows like:

- Collecting data – fill out the form (answer questions), click submit
- Filling out requests or giving approval—submit the form to initiate a process
- Executing a process like HR onboarding, registration, or e-government requests

Webforms can also trigger workflows, and can be saved, re-used and even chained together into consecutive automated processes.

Create a PDF Form to automate a process—in a snap.

Drag-and-drop fields to move them easily up and down, arranging them on the form.

Data Sources – Add auto-fill fields and pick lists of data values from CRM, ERP, and other company systems.

Palette – Select items to build and style your form, such as checkbox types, messages, images and logo.

Using PDF Forms to design and style forms for your unique business requirements will help users fill out forms more efficiently to trigger the right processes.

EDIT FORM TEMPLATE

Files / Files / Form Templates / ABC PO Sample

Step 2 of 3: Build the form.

Purchase Order EE4DDE1D-53F0-4F5A-A88A-31B658A1B961

print

Purchase Order

PODetails

Purchase Order ID

Purchase Total

Status

Request Date

Customer ID

Customer Name

Customer Phone

Customer Address

DATA SOURCES

- Purchase Order
- PODetails
 - Purchase Order ID
 - Purchase Total
 - Status
 - Request Date
 - Customer ID
 - Customer Name
 - Customer Phone
 - Customer Address
- XYZ Invoice

PALETTE

- Dropdown
- Radio
- Checkbox
- Section
- Repeat
- Panel
- Table
- Message
- Link
- Trigger
- Signature
- Form Viewer
- Text
- TextArea
- Date
- Email
- Money
- Phone
- Quantity
- Number
- T/F
- Image
- PageBreak
- ComboBox

Test Form Save Form Cancel Previous Next



FIT-FOR-PURPOSE CONTENT AND BUSINESS PROCESSING MANAGEMENT SOLUTIONS

Xerox® DocuShare® Flex is a cloud application that empowers Xerox Partners to provide highly tailored solution capabilities.

Here are just a few applications of the Xerox® DocuShare® Flex solution:

- Digital Mail
- Accounts Payable Processing Management
- Student Records Management
- Archival and Records Management
- Accounts Payable Processing Management
- HR Records Management

Example of a Fit-for-Purpose solution:

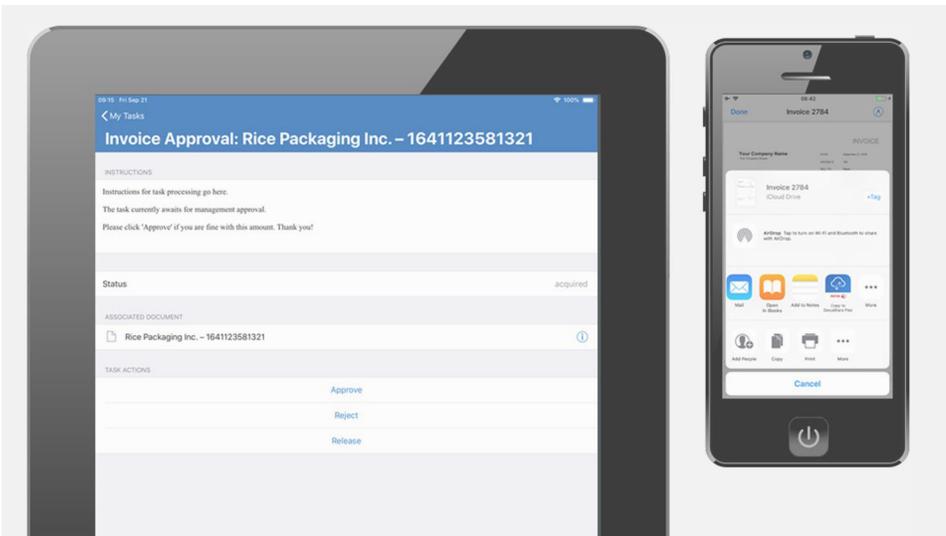
Xerox® DocuShare® Flex - Accounts Payable Processing Management Solutions

To reduce the time, labor, and cost of processing invoices, Xerox® DocuShare® Flex powers **Accounts Payable Processing Management**, a solution capability that enables:

- Ingesting paper and electronic invoices and AP documents (including 3rd party ingestion)
- OCR conversion, recognition and extraction of metadata
- Auto-fill-in of metadata from databases
- Multi-level review and approval workflows
- ERP integration

- Secure storage and archival
- Easily styled reports and dynamic dashboards
- 3-way matching
- Ability to connect to web validation
- Document matching
- Holiday schedules
- AP workflow process template with configurable roles, approval levels, delegations and interfaces

Some of the solution capabilities on this list depend on Xerox Professional Services or Xerox Partner enablement.



XEROX® DOCUSHARE® FLEX APP – ON THE GO

Today's workplace is mobile—you take your work with you. The **DocuShare® Flex App** is a mobile application supporting a range of features. You can log in, search and view documents, download, upload, and share them, manage tasks, including workflow approvals, and do easy mobile capture.

The App is available for iOS iPhones and iPads through the Apple iTunes Store for download.

To learn more about Xerox® DocuShare® Flex, visit: xerox.com/ecm