

YSOFT SAFEQ AUTOMATED SCAN WORKFLOWS

TABLE OF CONTENTS

1. TRENDS IN DOCUMENT DIGITIZATION	3
1.1 The "paper light" office	3
1.2 Rise of DMS, ECM and file sharing apps as document repositories	4
2. WHY AUTOMATED DIGITALDOCUMENT WORKFLOWS	6
2.1 Improved productivity	6
2.2 Accuracy and consistency	7
2.3 Flexibility	8
3. BEST PRACTICES FOR DIGITALDOCUMENT WORKFLOW SOLUTIONS	9
3.1 Understand the entire document lifecycle	9
3.2 Keep it simple	9
3.3 Secure workflows	10
3.4 Seamless integration with document repositories	11
4. YSOFT SAFEQ MANAGEDWORKFLOWS	12
4.1 How YSoft SafeQ helps you achieve best practices for digital workflows	13
5. YSOFT SAFEQ – A WORKFLOW SOLUTIONS PLATFORM	25
6. USE CASES	26

1. TRENDS IN DOCUMENT DIGITIZATION

1.1 THE “PAPER LIGHT” OFFICE

Since transition from paper to electronic documents first began in the 1980s, most businesses have come to the realization that an entirely paperless office is extremely difficult to achieve. For example, according to the AIIM's 2017 State of Information Management survey, only 24% of companies have fully digitized processes. After three decades, digital transformation has proven to be a slow process and many have realized it is not practical to become completely paperless. The IDC MaturityScape Benchmark: Digital Transformation (Figure 1) shows the lengthy process to achieve a complete digital transformation.

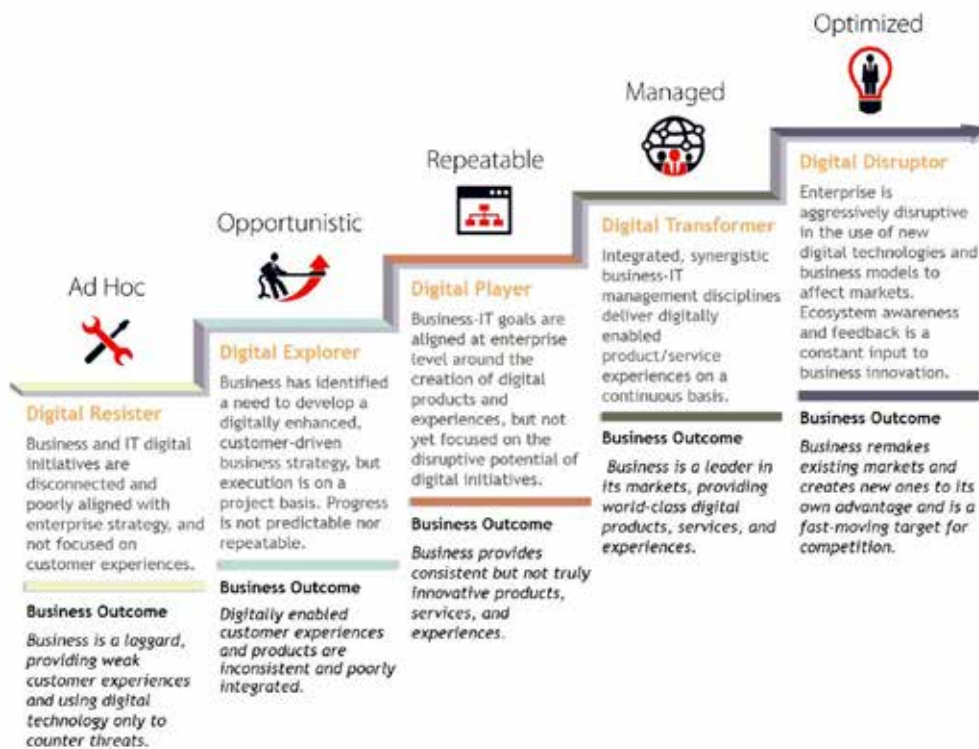


Figure 1
Digital Transformation
(DX) MaturityScape Stage
Overview¹

Today, most organizations are either at the “Opportunistic” or “Repeatable” stage of the IDC MaturityScape. Instead of achieving a paperless state, most organizations can achieve what we call a “paper light” state because, while even the most digitally mature organization may not require paper documents, the “outside world”, such as partner businesses or government organizations, is still heavily reliant on paper. For example, most countries still prefer a physical signature on important legal contracts. For that reason, companies should look for solutions that support a paper light concept instead of trying to eliminate paper altogether.

Organizations have already invested in multifunction devices (MFDs). These devices can be used in a paper light strategy with document capture workflow solutions.

This white paper outlines the rise of document capture workflows, their benefits and how the YSoft SafeQ Workflow Suite offers powerful scanning and document capture workflows that are simple and easy for employees and IT administrators alike.

¹ IDC MaturityScape: Digital Transformation 1.0, March 2015, Doc #254721

1.2 RISE OF DMS, ECM AND FILE SHARING APPS AS DOCUMENT REPOSITORIES

1. Compared to 2015, where AIIM found that nearly 80% of organizations relied on email for collaboration, in 2017, the use of email has decreased to 52%. (Figure 2).

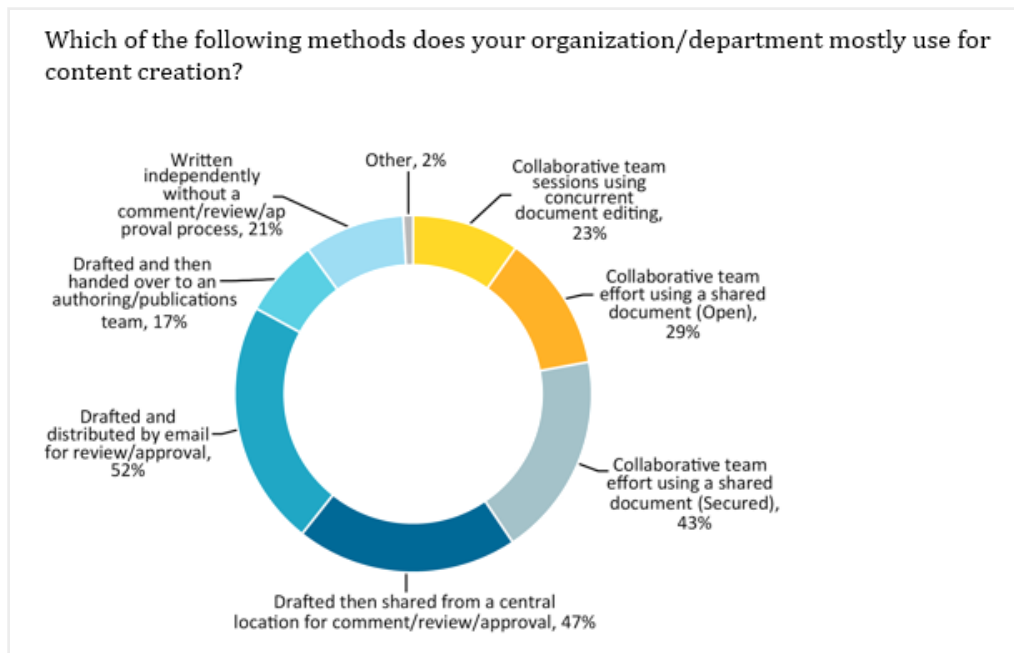


Figure 2
Reference: 2017 State of Information Management: Are Businesses Digitally Transforming or Stuck in Neutral?

www.aiim.org/research

Use of email as a collaboration and document sharing tool is fraught with peril. In addition to being a misuse of email, where attachments clog up email storage systems, sharing documents via email is insecure and counterproductive. While this white paper will discuss productivity in the next section, the harmful nature of scan to email is worthwhile noting here.

THE PERILS OF SCAN TO EMAIL

As IT professionals, you know that email storage is expensive and documents traveling throughout your email system impacts storage needed for your organization. Beyond the misuse of email in this way, scan to email is harmful in other ways:

Unsecure and non-compliant: A scanned document sent by email allows sensitive and confidential documents to be forwarded easily to anyone outside the company or to the wrong people internally. In industries that must adhere to compliance regulations to ensure privacy, the potential for human error or malicious behavior can have serious consequences.

Inconsistent document format, quality and file naming: Today's scan or multifunction devices are complicated with not so intuitive menu systems. The user has to make many decisions, including adding the output file type, scan quality settings and name of the document. This results in inconsistencies, making it difficult to manage digital content easily.

Limitations of image files: Traditional scan to email usually only creates an image file as a read-only PDF document. Consequently, text cannot be keyword searched and retrieved easily. Costly time is spent on searching for documents that could be better spent on more productive activities.

Today's organization has to stay competitive by being nimble and collaborative. Using external document repositories is essential to share information with in-office workers, remote workers, a mobile workforce, and with the expanded workforce which can include contractors and partners.

Therefore, it is crucial that organizations invest in secure document capture solutions which produce digital documents that are easily and securely delivered into external document repositories such as ECMs (Electronic Content Management systems), DMSs (Document Management Systems), enterprise social software and ERP systems.



2. WHY AUTOMATED DIGITAL DOCUMENT WORKFLOWS

2.1 IMPROVED PRODUCTIVITY

Creating digital documents by itself, for example ad-hoc scanning to email or personal folders, does not increase productivity. On the contrary, it reduces productivity. Let's take a look at an example real-life scenario:

EXAMPLE SCENARIO

- Employees of a company are required by law to complete health and safety regulatory certifications every year. Certifications cover different areas – e.g. fire safety, road safety, etc. For each area, a corresponding paper certificate is issued to an employee by a third-party testing agency.
- The employee is required to print, sign and submit a paper copy of the certificate to the company's education department.
- The organization's education department files digital copies of the certificates in the company's digital document archiving system under each employee's record, where they are required to be stored for up to 10 years.

For this example, we'll assume 25 certificates are processed monthly.

Old world: scan to email

- A manager in the education department receives paper certificates from employees and verifies they are signed as required.
- Once a month, the manager scans each paper certificate separately on a multifunctional device (MFD). The MFD sends each certificate via email as a PDF attachment to the manager's email inbox.

That's 25 emails with attachments sent to the manager's email inbox.

- The manager opens each email and downloads the PDF attachment saving it to a location on his workstation.
- The manager opens each PDF document to verify the scan is readable and changes its file name to include the date of completion of the certificate and a unique employee number, which is found in the PDF.
- The manager logs into the company's digital document archiving system and for each of the 25 PDF files, navigates to the employee's record, selects a folder corresponding to the type of the certification, and uploads the PDF document.
- The manager deletes the emails from his inbox where they remain in a deleted email folder until they are permanently deleted.

"Business process automation solutions enabled by MCS [Managed Content Services] allow customers to digitize paper documents from selected processes and bring them into business systems at just the right point in the process."

Gartner, January 10, 2017, Exploit Print Market Dynamics Primer for 2017 Document # G00318293

New world: automated digital document workflows

- A manager in the education department receives paper certificates from employees and verifies they are signed as required. Each issued certificate now contains a barcode, which contains a unique employee number and the type of certificate and the date of completion.
- Once a month, the manager collects all the paper certificates and scans them as a batch using a predefined workflow for employee certificates.
- Each scanned document is automatically given a filename that includes the employee's ID number and the date of the certification, information provided by the barcode, and is uploaded to the company's digital document archiving system under the employee's record in a folder corresponding to the type of the certification as a PDF document.
- At the same time, another manager in the education compliance department is automatically notified via email that an employee completed a certification with a direct link to the PDF document.

As we can see in the example above, automated digital document workflows removes repetitive steps in receiving and delivering the digital scans. This can provide significant gains in productivity. Increasing productivity and lowering costs were cited by 55% of respondents as the top reason for implementing digital transformation projects, according to AIIM (Information Management Survey, 2017).

In order to increase productivity, businesses should aim to automate continuous digitization of paper based documents. This level of automation can only be achieved if the business chooses a document capture solution which combines simplified digitization of paper documents with unattended processing and delivery of digital documents to their final destination.

A document capture solution enables businesses to predefine structured document workflows according to their needs. In short, digital document workflows are blue-print instructions that automate repetitive capturing, processing and delivery of digital documents.

2.2 ACCURACY AND CONSISTENCY

The example scenario in the previous section also demonstrates how certain manual steps, such as manual selection of a document destination folder and manual naming of digital files, can be eliminated, decreasing the possibility of human errors in the digitization process.

Using the same "new world" scenario, the file naming and location of digital files will be consistent and predictable with every scan of a paper document. The automated digital workflow ensures that the structure and content of the document repository remains consistent and accurate over time as thousands of documents are repetitively scanned. Consistency and accuracy of a digital document repository adds to overall accuracy and quality of data in an organization. In fact, according to an AIIM 2016 tip sheet, **How Quickly and Accurately can you process documents?**, data accuracy is the most important document processing metric for 49% of organizations.

48 percent of CIOs said that data quality is an ongoing problem in their organization, largely because of their reliance on manual processes, yet could increase their organizations' profit by an average of 15% if their data was of the highest quality.

Experian, 2015 "Global Data Quality Research Discussion Paper 2015"

2.3 FLEXIBILITY

Of course, some manual steps in the example scenario in Section 2.1 could be automated even further. For example, instead of manual verification of the presence of an employee signature, the solution could automatically verify the presence of a signature and warn the employee she needs to sign the certificate before submitting it.

One of the benefits of digital document workflows is that they can be customized on demand to suit the level of automation your organization needs. If your organization is ready to automate additional steps in a business process, the instructions in the workflow “blueprint” can be easily modified to adapt to the new business requirements.



3. BEST PRACTICES FOR DIGITAL DOCUMENT WORKFLOW SOLUTIONS

3.1 UNDERSTAND THE ENTIRE DOCUMENT LIFECYCLE

As explained in section 2.1, automated digital document workflows aid in improving productivity. Yet simply rolling out a workflow automation solution will not increase productivity as the solution is unlikely to be used to its full potential unless employees are involved in the workflow's creation.

Your workflow automation solution provider should work with managers in your organization responsible for digitization strategies in order to determine the entire document lifecycle. In this way, the right workflow can be achieved in either a fully or in a graduated way. This means that organizations should focus on their processes and improving their effectiveness, instead of just focusing on removing paper.

Simply put: understand paper document processes first, then apply technology to automate them and adapt the technology over time. As explained in section 2.3, a good workflow automation solution should be flexible enough to accommodate the automation level you need now and in the future.

3.2 KEEP IT SIMPLE

A key characteristic of a digital document workflow solution is minimum obstacles for its users. The solution must be simple to understand, easy to use and be efficient. This characteristic should apply not only to employees who use the automated workflows, but also to those who configure the solution and create the document workflows, typically IT administrators.

REMOVING BARRIERS FOR END USERS

Rolling out a user friendly document digitization solution will not only reduce resistance to digitizing paper documents, but will ultimately lead to reducing the transition time from paper to digital.

For end users, the experience of digitizing a document must be intuitive and familiar all the way from verifying their identity and workflow access rights on an MFD, to selecting a workflow, to scanning a paper document. It is crucial that the experience of digitizing a paper document be "embedded" into the MFD terminal user interface and does not dramatically differ from the other capabilities of the MFD such as printing or copying documents.

Furthermore, user interface complexities and the number of steps involved in digitizing a document should be reduced to an absolute minimum so that the possibility of human errors, which can significantly impact the accuracy and consistency of digitized documents as discussed in section 2.2, can be eliminated.

"The human factor seems to remain the biggest challenge to project success followed by costs and budgets."

AIIM 2017 Information Management survey

REMOVE BARRIERS FOR IT ADMINISTRATORS

Workflows must be pre-defined by IT administrators who understand the ultimate goals of digitization and can assign rights for the workflows to individual or groups of users. The solution must allow a way to configure workflows to rely minimally on end user input to provide context information when scanning and to provide clear instructions to guide end users through the digitization process.

In order to make configuration of workflows efficient, the solution must provide IT administrators with a simple, familiar and easily accessible way to define workflows. This can be accomplished by a centralized workflow administration interface, which also offers instant access to statistics, reports and troubleshooting of document digitization workflows.

3.3 SECURE WORKFLOWS

Organizations should select digital document workflow solutions capable of securing the entire automated document digitization process. At a minimum, the solution should be capable of covering the following areas of security:

USER-LEVEL AND ROLE-BASED SECURITY

The ability to authorize and authenticate users is at the heart of a digital document workflow solution. Authentication must already take place at the point at which a paper document becomes a digital document. For example, devices used for capturing documents, such as MFDs or mobile devices, should require users to authenticate with employee credentials (this can be done by requiring a user name/password, a PIN or use of an identity card and card reader device). Once authenticated, the solution can present workflows based on their roles and rights.

As a result:

- Users gain access to workflows relevant only to their role in the organization. This is the first step to prevent delivering documents to unintended locations.
- The solution is capable of honoring user access and document ownership rights inside the destination system as documents can be delivered under the identity of the authenticated user.

In the destination system, delivered documents can be traced back to the person who first scanned the document and other users with insufficient privileges can be prevented from accessing and manipulating the documents.

It should be noted that destinations can be cloud-based document repositories or on-premise shared folders or applications. The solution should be able to sign into these types of systems seamlessly in the background, without the user having to provide access credentials every time a document is scanned.

MULTIPLE MECHANISMS FOR SAFEGUARDING SCANNED DOCUMENTS AND DATA

Document workflow solutions must provide end-to-end security during processing, transport and delivery of digital documents to prevent both internal and external threats. Once a document is scanned on an MFD, it and all scan metadata, must be transferred from the MFD to the workflow solution's servers over a secure communication channel. Subsequent delivery of the document from the servers to (possibly external) document repositories must also be over a secure channel.

In addition to this "data in transit" security, the solution must be capable of securing "data at rest". For example, as documents are processed by the solution's servers, any temporary copies of the documents must be encrypted. Additional document encryption at the destination may also be desirable in the case of highly sensitive documents that are subject to compliance regulations. Importantly, the solution should hide these security complexities from its end users to provide an unobtrusive user experience.

ACTIVITY HISTORY TRACKING AND AUDITING

The ability to track and audit document digitization processes is not only needed by IT administrators to monitor and troubleshoot document workflows from a technical standpoint, but also may be a current or future legal compliance requirement for organizations.

For example, organizations may be required to trace and report which sensitive documents entered and left the company, in other words, which documents were digitized, when they were digitized and by whom and, when and where they were delivered

(Note that being able to trace "whom" can be achieved only in combination with user-level and role-based security discussed above). Document workflow solutions should offer an easy way to generate high-level digitization history and audit reports on an ad-hoc or scheduled basis and the capability to drill down into and export detailed digitization history logs if required.

3.4 SEAMLESS INTEGRATION WITH DOCUMENT REPOSITORIES

As discussed in section 1.3, the replacement of email by DMS and ECM systems requires businesses to invest in document digitization solutions that integrate seamlessly with such systems for the fullest potential.

For end users, integration is seamless when they are not required to know the underlying details of the integration at the various stages of digitization. For example, when a user scans a document which will be delivered to a DMS by an automated workflow, the user should not be required to login with the DMS every time the workflow is used to scan a document. Also, the user should be able to access the capabilities of the DMS on the MFD screen without being deprived of the familiar user interface of the document digitization solution.

For IT administrators, a seamless integration solution means minimal steps to configure the workflow to integrate with these systems. Configuration of integrated workflows should be part of the centralized administration interface and require no third-party configuration tools unless a destination system requires it. As multiple destination systems may be used in an organization, integration of the workflow for different systems should be consistent and familiar.

"89% of organizations require audit trails and that executed processes be secure."

AIIM, 2016

Tip Sheet: How quickly and accurately can you process documents?

4. YSOFT SAFEQ MANAGED WORKFLOWS

Designed with simplicity for the user in mind, YSoft SafeQ Managed Workflows² have three main phases: Capture > Process > Deliver.

From the user's perspective, simplicity means as few steps as possible without decisions. For example, after identifying an MFD, and selecting "Scan", the user is presented with a menu of workflows they are authorized to perform. Upon choosing a workflow, the user places their documents on the MFD feeder or glass and presses scan. YSoft SafeQ does the rest as its capture parameters, processing steps and delivery destinations are all pre-defined by the workflow.

From the administrator's perspective, when creating a workflow, the capture, processing and delivery parameters are defined once. Then the administrator assigns access rights for the workflow to individuals or groups of individuals.

The workflow for the user can be graphically shown as in Figure 3.

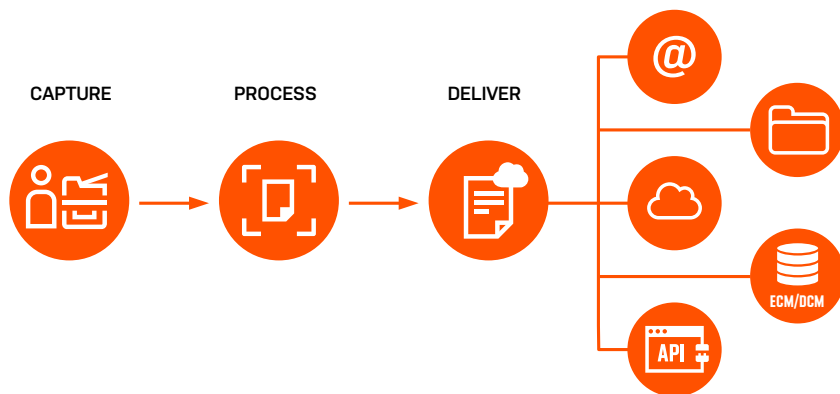


Figure 3
YSoft SafeQ Managed Workflows

Table 1
YSoft SafeQ Managed Workflows phases.

The following table summarizes what the workflow accomplishes in each phase.

CAPTURE	PROCESS	DELIVER
User authenticates at the MFD to access workflows	Optical Character Recognition (OCR) applied	Secure transport, delivery to destination
User selects a workflow	Barcode recognition applied	Destinations: local and network file systems, cloud-based repositories, on-premise applications, ECM/DCS systems, scan to email if desired
Optionally, user may be asked to enter metadata	Image and document cleaning (despeckling, blank page removal, page orientation and skew correction)	Delivery status notifications sent
Limited UI choices reduce input error	PDF password security and PDF compression	Delivery recorded on behalf of user who scanned document
Optional folder browsing at destination	Append or pre-pend pages	
User can highlight text for file naming	Output formats: PDF; PDF/A, Microsoft Word, Excel, PowerPoint, plain text	

² Automated scan workflows is a feature introduced in YSoft SafeQ 6. Previous versions of YSoft SafeQ do not support the features described in this document.

4.1 HOW YSOFT SAFEQ HELPS YOU ACHIEVE BEST PRACTICES FOR DIGITAL WORKFLOWS

CREATING WORKFLOWS

Y Soft recommends a set of best practices to guide administrators in creating workflows that are simple for users and easy to maintain or update.

Workflow creation best practices for a simplified user experience:

Simplicity and familiarity: Integrated print and scan workflow experience

YSoft SafeQ provides an intuitive and familiar experience to MFD users through its integrated print and scan workflows application embedded into the MFD's terminal. From the MFD users' perspective, using scan workflows and printing on an MFD is consistent and can be operated from a single application.

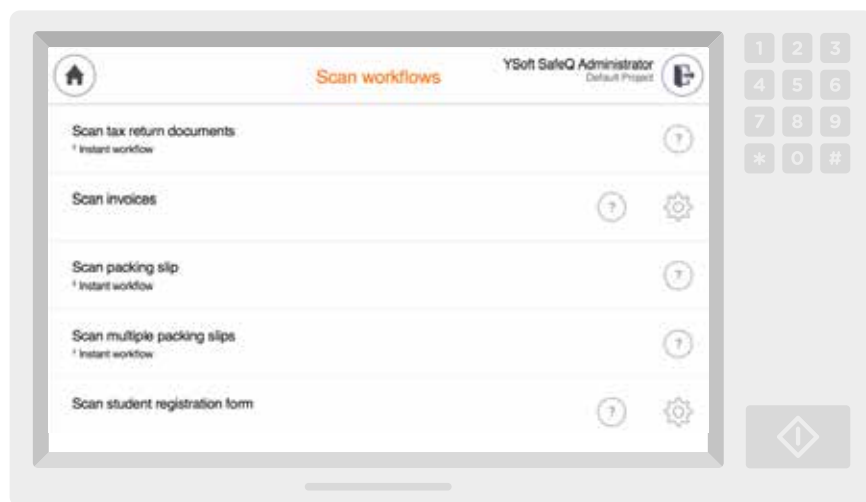
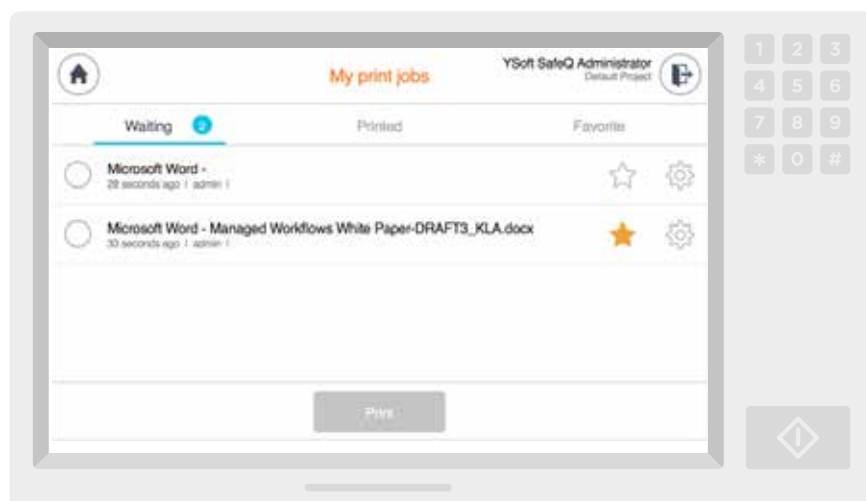


Figure 4
Consistent printing and scanning from YSoft SafeQ MFD user interface.



Restricting advanced scan options: To further simplify the MFD user experience with scanning, IT administrators can restrict the user from changing advanced scan options such as scan color, resolution and output file format. Restricting users from changing these advanced scan options eliminates confusing and inconsistent decision making by the user. For the organization it adds to maintaining a consistent and accurate document repository because digital documents produced by the scan workflow will always be of consistent quality.

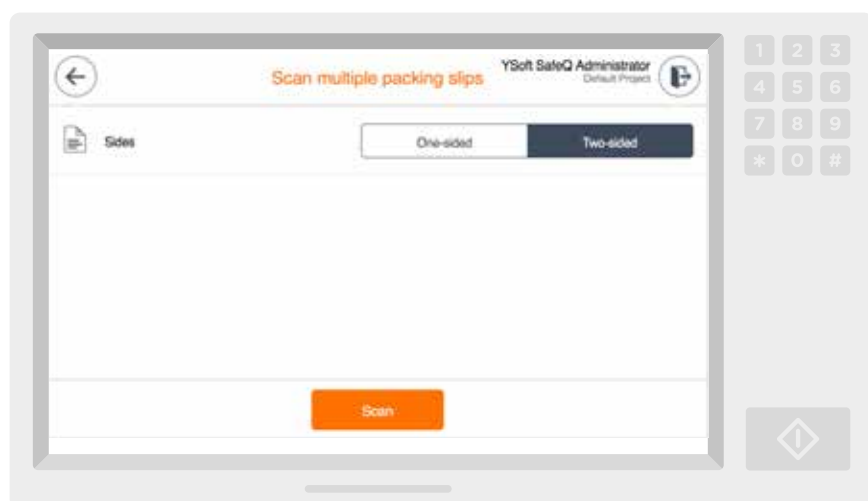
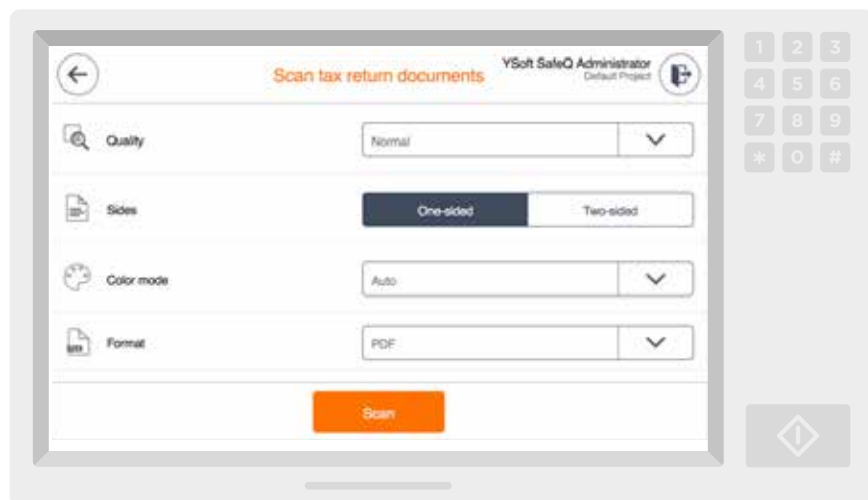


Figure 5
Top: unrestricted advanced scan options.
Bottom: restricted advanced scan options.

Quick scan workflows: With YSoft SafeQ, IT administrators can pre-configure "Quick" scan workflows, which let MFD users digitize documents quickly and efficiently without having to provide input manually at the MFD. With one press of a button, the document is scanned, processed and delivered to its final destination. The MFD user can simply scan and forget about the details as they are taken care of automatically by YSoft SafeQ.

YSoft SafeQ quick scan workflows are complemented by the ability to automatically collect contextual scan metadata such as date of scan and name of the user who is scanning instead of collecting such information through error prone manual input by the user. Metadata can also be automatically obtained from the scanned document by extracting information from 1D barcodes or highlighted text.

Pre-defined user input fields: If the business process requires MFD users to provide scan metadata through manual input at the MFD, YSoft SafeQ workflows can prompt for user input by adding user input fields ranging from validated free text input to selection from lists of predefined options. By using lists of predefined options, chances in user input error can be further lowered.

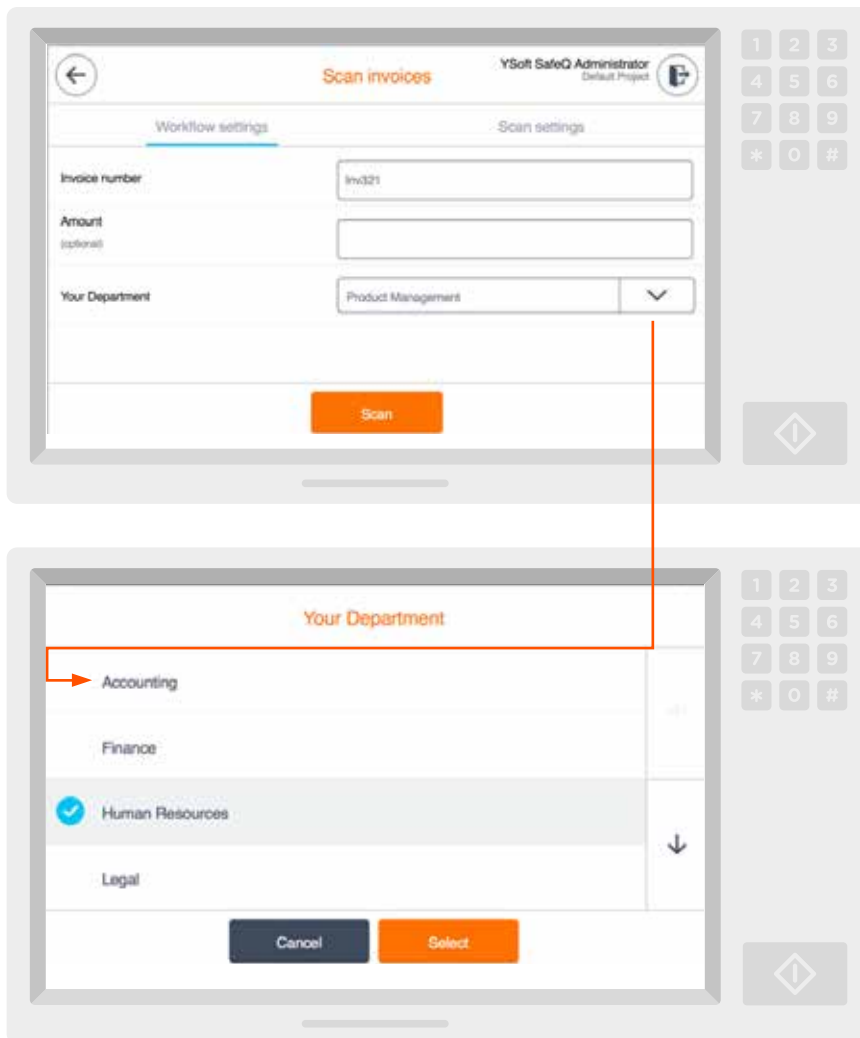


Figure 6
List of predefined options on
YSoft SafeQ MFD user interface

Provide customizable help messages: YSoft SafeQ provides a help screen where custom instructions or a help message for each scan workflow can be displayed. IT administrator-defined messages can be viewed directly on the MFD screen by the end user before scanning a document.

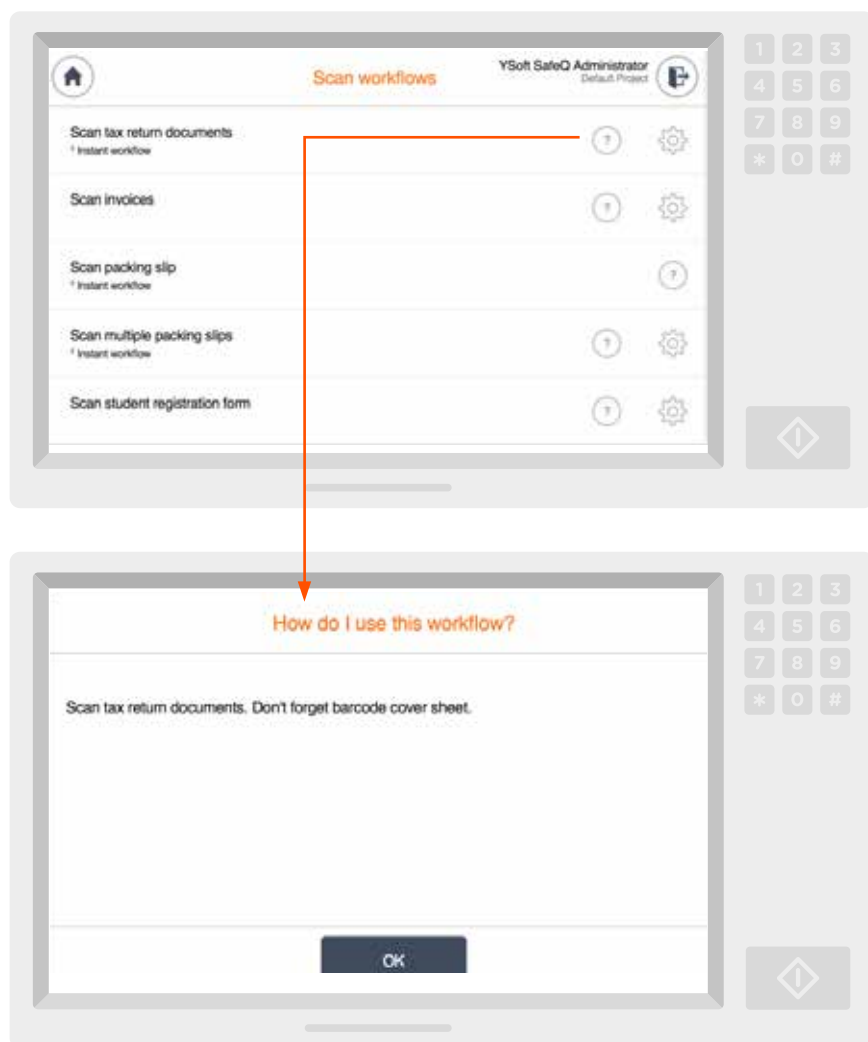


Figure 7
Workflow "help" screen with a custom message

Workflow creation best practices for administrators:

Flexibility with YSoft SafeQ: With YSoft SafeQ, existing workflows can be edited on-demand to correspond to the latest changes in business requirements. Changes to a workflow do not require lengthy administration steps and can be applied instantly.

For example, with a few clicks, the destination for scanned documents can be changed, processing steps can be added and automatic file naming rules can be modified easily by an IT administrator in the YSoft SafeQ web management interface. Workflow changes can be rolled out immediately across the entire company without end users knowing what was changed behind the scenes so their experience is unaffected.

THE YSOFT SAFEQ MANAGEMENT INTERFACE

In YSoft SafeQ, the IT administrator configures scan workflows using a central web-based management interface accessible over a standard web browser. The central management interface provides a single point of configuration both for print management³ and scan workflows capabilities of YSoft SafeQ.

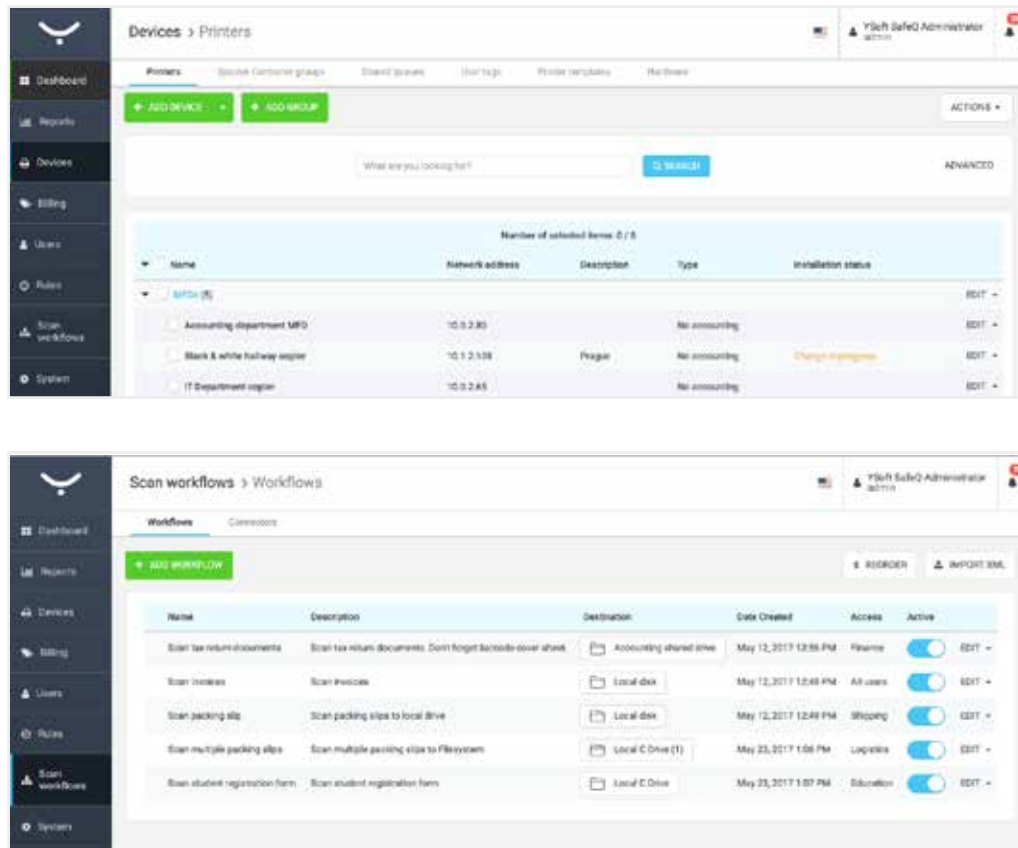


Figure 8
Single point of configuration for print (top) and scan (bottom) management

³ Scan workflows are available in the YSoft SafeQ Workflow Suite or can be bundled with print management features in the YSoft SafeQ Enterprise Suite.

USER LEVEL AND ROLE BASED SECURE ACCESS

YSoft SafeQ provides multiple ways to securely authenticate users against a corporate database before access is given to workflows on the MFD. The corporate database can be easily replicated from Active Directory. Users can authenticate with a PIN, their company ID badge or their user name and password at any MFD in the company, at any location.

Once a user is authenticated, YSoft SafeQ presents the personalized list of scan workflows corresponding to the role of that user in the database. Each scan workflow specifies its individual access list of user roles, which can be defined and changed on demand by IT administrators. This ensures that each scan workflow will always be accessible to the users who are entitled to use it.

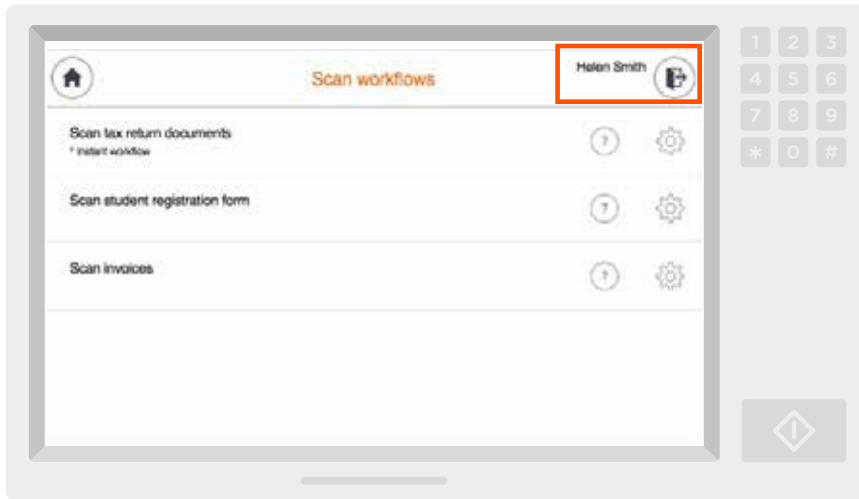
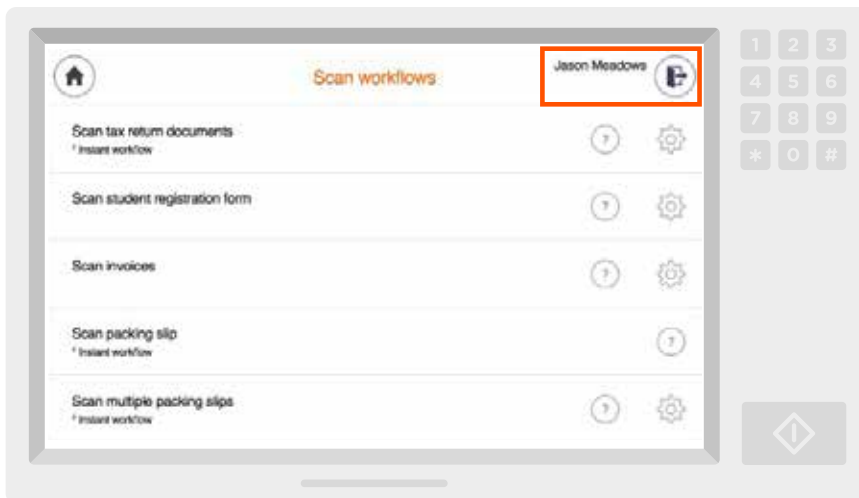


Figure 9

Different lists of authorized workflows are presented for two different users on the MFD screen



IMPERSONATION

Additionally, YSoft SafeQ is capable of "impersonating" the authenticated user and securely propagates the end user's identity from the document capture to the delivery phase of the scan workflow. Not only will documents in the destination be under the ownership of the user who created the scan, but the user can also browse the folder structure in the destination system directly via the MFD screen. Only folders the user is allowed to access can be viewed.

User impersonation can be enabled or disabled by the IT administrator according to the level of security required for that workflow.

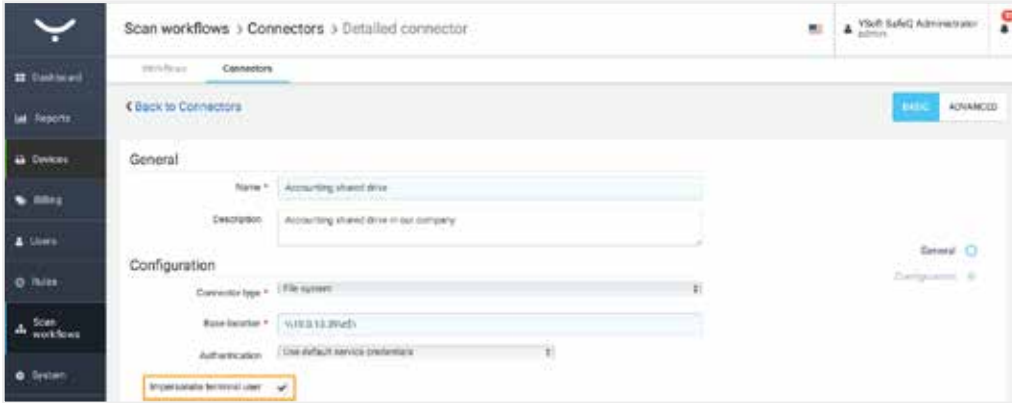


Figure 10
Impersonate terminal user setting in connector configuration

DATA “IN TRANSIT” AND DATA “AT REST” SECURITY

YSoft SafeQ allows IT administrators to easily configure the required level of end-to-end security of transport and delivery of digital documents. Depending on the capabilities of the MFD model, scanned documents and metadata can be transferred to YSoft SafeQ servers for processing using a secure transfer protocol such as HTTPS.

YSoft SafeQ always uses the most secure transfer protocol available to deliver scanned files from the servers to the destination system, whether it be for external cloud-based systems such as Dropbox® Business or on-premise systems such as Microsoft SharePoint®. YSoft SafeQ offers multiple ways to secure data at rest.

YSoft SafeQ stores all temporary files on the server file system, which can be encrypted using operating system-level encryption by the IT administrator. Once delivered to their destination, YSoft SafeQ allows IT administrators to password protect sensitive documents by enabling PDF document encryption⁴. Only users with the password will be able to unlock the document.

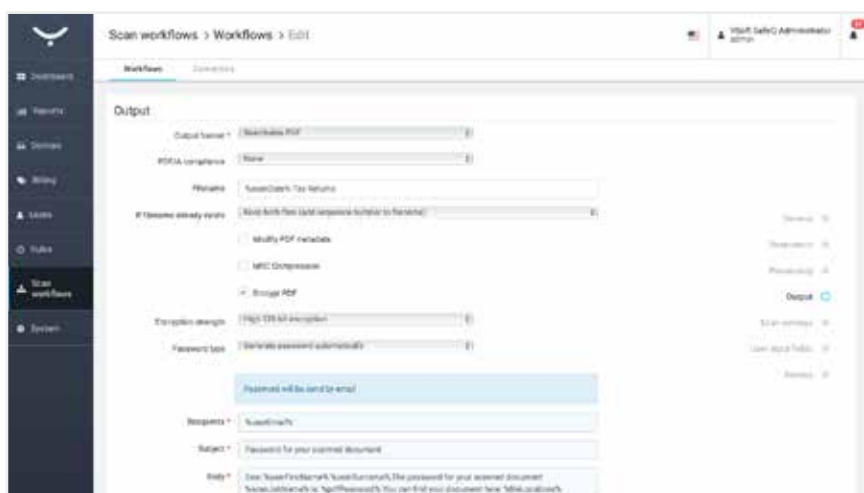


Figure 11
Configuration of PDF encryption

⁴ Password protected PDF is an available feature in the YSoft SafeQ Workflow Suite and YSoft SafeQ Enterprise Suite. When purchasing modules individually, this feature is in the Advanced Workflows module.

TEXT REDACTION

Redacting text can be used by turning on the "highlighted text redaction" feature⁵. When in use, during the processing any text that is highlighted is redacted in the resulting digital document. Even if documents with redacted text are insecurely stored or leaked outside the organization, the sensitive redacted text cannot be found with keyword search.

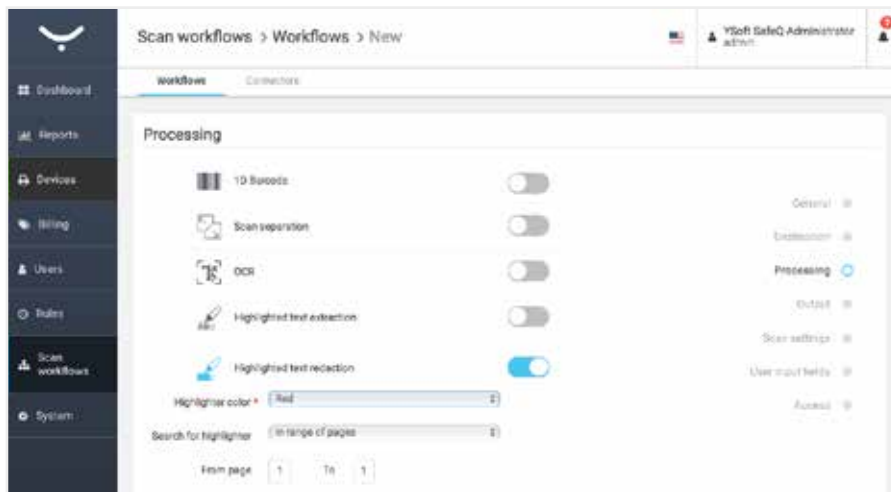


Figure 12
Configuration of the highlighted text redaction feature

⁵ The highlighted text redaction feature is available in the YSoft SafeQ Workflow Suite and the YSoft SafeQ Enterprise Suite. When purchasing modules individually, this feature is in the Advanced Workflows module.

ACTIVITY HISTORY TRACKING AND AUDITING

YSoft SafeQ Reporting offers high level and granular detailed reports ranging from the history of executed scan jobs to a history of user authentication attempts on MFDs.

Reports can be delivered on an ad-hoc or scheduled basis directly from the YSoft SafeQ web management interface. If additional levels of detail are required, the IT administrator can access thorough log files securely stored on YSoft SafeQ servers, which can be further analyzed for full audit trail and troubleshooting purposes.

User	Job name	Status and lock	Date	Type
YSoft SafeQ Administrator (admin)	Scan Job 2184	Scan	July 31, 2017 11:28 AM	20
YSoft SafeQ Administrator (admin)	Scan Job 2183	Scan	July 31, 2017 11:27 AM	30
YSoft SafeQ Administrator (admin)	Scan Job 2182	Scan	July 31, 2017 11:27 AM	20
YSoft SafeQ Administrator (admin)	Scan Job 2181	Scan	July 31, 2017 11:26 AM	20

Figure 13
YSoft SafeQ scan job history

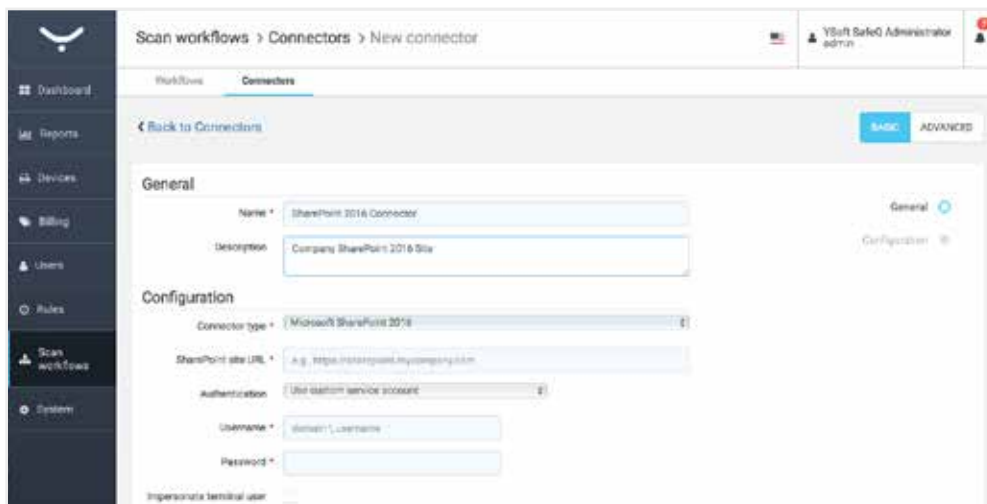
Date	Status	Message
July 31, 2017 11:27 AM	Scan	Job accounted. Scan: 3 pages Total: 3 pg, 6 0.00

YSOFT SAFEQ SCAN WORKFLOW CONNECTORS INTEGRATE WITH DOCUMENT REPOSITORIES

YSoft SafeQ ensures seamless integration with 3rd party document repositories through configurable scan workflow connectors. YSoft SafeQ offers connectors both for on-premise repositories such as file system network shares and Microsoft SharePoint, and cloud-based repositories such as Dropbox Business and Microsoft Office 365 (please refer to our [online library of connectors](#) for a full listing of available connectors).

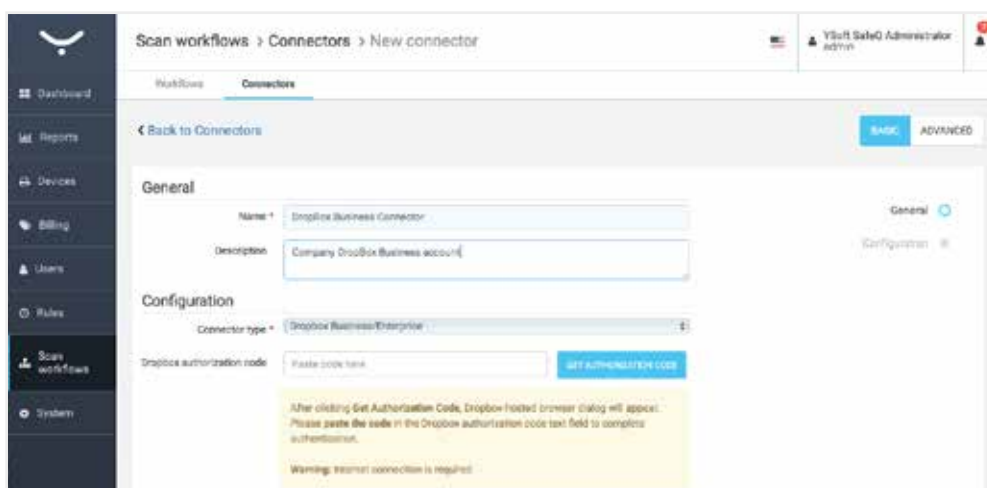
The available connectors are a standard feature of YSoft SafeQ, which means that Y Soft creates, tests and supports the connectors. By creating these connectors ourselves, we commit to ensuring that it works on today's version of the 3rd party system and that timely updates will be made should the 3rd party system change.

Connectors are configured once by IT administrators through the YSoft SafeQ management interface and then utilized by any number of workflows to deliver scanned documents. As connector configuration is fully integrated into the YSoft SafeQ management interface, the IT administrator is not required to learn an additional configuration tool to configure connections with 3rd party systems. For example, the experience of configuring a connection to Microsoft SharePoint 2016 and to Dropbox Business is familiar and consistent although the underlying technologies and purpose of the two document repositories are significantly different.



The screenshot displays the 'New connector' configuration page in the YSoft SafeQ management interface. The breadcrumb trail is 'Scan workflows > Connectors > New connector'. The user is identified as 'YSoft SafeQ Administrator admin'. The page has tabs for 'Workflows' and 'Connectors', with 'Connectors' selected. A 'Back to Connectors' link is visible. There are 'BASIC' and 'ADVANCED' tabs, with 'BASIC' selected. The configuration is divided into 'General' and 'Configuration' sections. In the 'General' section, the 'Name' field is 'SharePoint 2016 Connector' and the 'Description' is 'Company SharePoint 2016 Site'. In the 'Configuration' section, the 'Connector type' is 'Microsoft SharePoint 2016', the 'SharePoint site URL' is 'A.g. https://sharepoint.mycompany.com', the 'Authentication' is 'Use custom service account', the 'Username' is 'domain\username', and the 'Password' field is empty. There is also an 'Impersonate terminal user' field.

Figure 14
Consistent IT administrator experience configuring a Microsoft SharePoint® 2016 and Dropbox Business connector



The screenshot displays the 'New connector' configuration page in the YSoft SafeQ management interface for a Dropbox Business connector. The breadcrumb trail is 'Scan workflows > Connectors > New connector'. The user is identified as 'YSoft SafeQ Administrator admin'. The page has tabs for 'Workflows' and 'Connectors', with 'Connectors' selected. A 'Back to Connectors' link is visible. There are 'BASIC' and 'ADVANCED' tabs, with 'BASIC' selected. The configuration is divided into 'General' and 'Configuration' sections. In the 'General' section, the 'Name' field is 'Dropbox Business Connector' and the 'Description' is 'Company Dropbox Business account'. In the 'Configuration' section, the 'Connector type' is 'Dropbox Business Enterprise', and the 'Dropbox authorization code' field is empty. A 'GET AUTHORIZATION CODE' button is present. A yellow warning box states: 'After clicking Get Authorization Code, Dropbox hosted browser dialog will appear. Please paste the code in the Dropbox authorization code text field to complete authentication. Warning: Internet connection is required.'

For end users, YSoft SafeQ connectors completely hide the details behind scanning to a 3rd party document repository as authentication complexities are always pre-configured by IT administrators in the management interface. The end user is never required to supply user name or password credentials for the 3rd party document repository on the MFD. Instead, pre-configured service account credentials with the possibility to impersonate the identity of the user authenticated at the MFD are always used.

Also, the user interface on the MFD terminal remains consistent and familiar when scanning to different destination systems. Below, screens of scanning to Microsoft SharePoint 2016 and Dropbox Business demonstrate this capability.

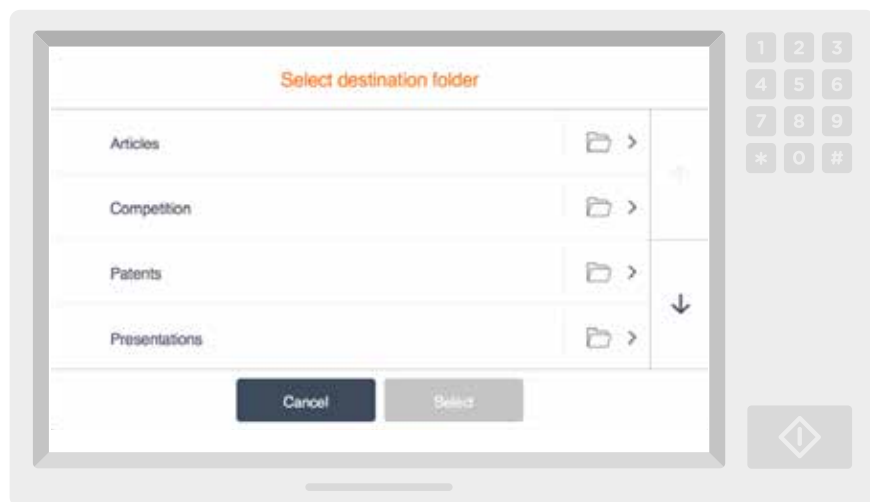
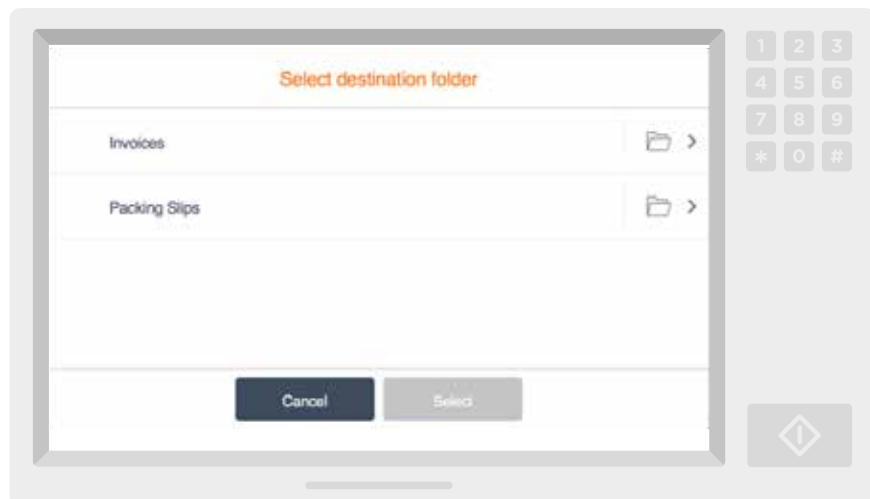


Figure 15
Folder browsing with Microsoft SharePoint® connector vs. folder browsing with Dropbox Business connector

5. YSOFT SAFEQ – A WORKFLOW SOLUTIONS PLATFORM

YSoft SafeQ is a platform for building smart businesses. The platform today provides solutions for print management, document capture with automated scan workflows and 3D print management, Figure 16.



Figure 16
The YSoft SafeQ Platform

Y Soft's platform approach has many benefits. Key to the platform is the offering of solutions in Suites or individual modules. While individual modules allows customers to buy the functionality they need today and add modules in the future, purchasing a Suite offers the greatest value.

For the scan workflow features described in this document, an organization can purchase any of the following Suites:

- YSoft SafeQ Workflow Suite – includes both Core and Advanced Workflows modules and other essential modules such as Reporting and Authentication
- YSoft SafeQ Enterprise Suite – includes both Core and Advanced Workflows modules plus all YSoft SafeQ print management modules
- YSoft SafeQ Print Management Suite – includes all YSoft SafeQ print management modules and the Core Workflows module

The platform approach also offers additional benefits:

- Lower cost due to shared modules that are used in any of the Suites (for example, the Authentication, Reporting and Print Roaming modules)
- A unified user experience for printing and scanning; one system to install, manage for IT administrators; other solutions are not so tightly integrated
- For organizations who need both print management and document workflows, a tightly integrated platform means one supplier with integrated support
- Tight integration with document repository systems
- Customizable, easy to use
- Integrated with the world's most recognized MFD brands

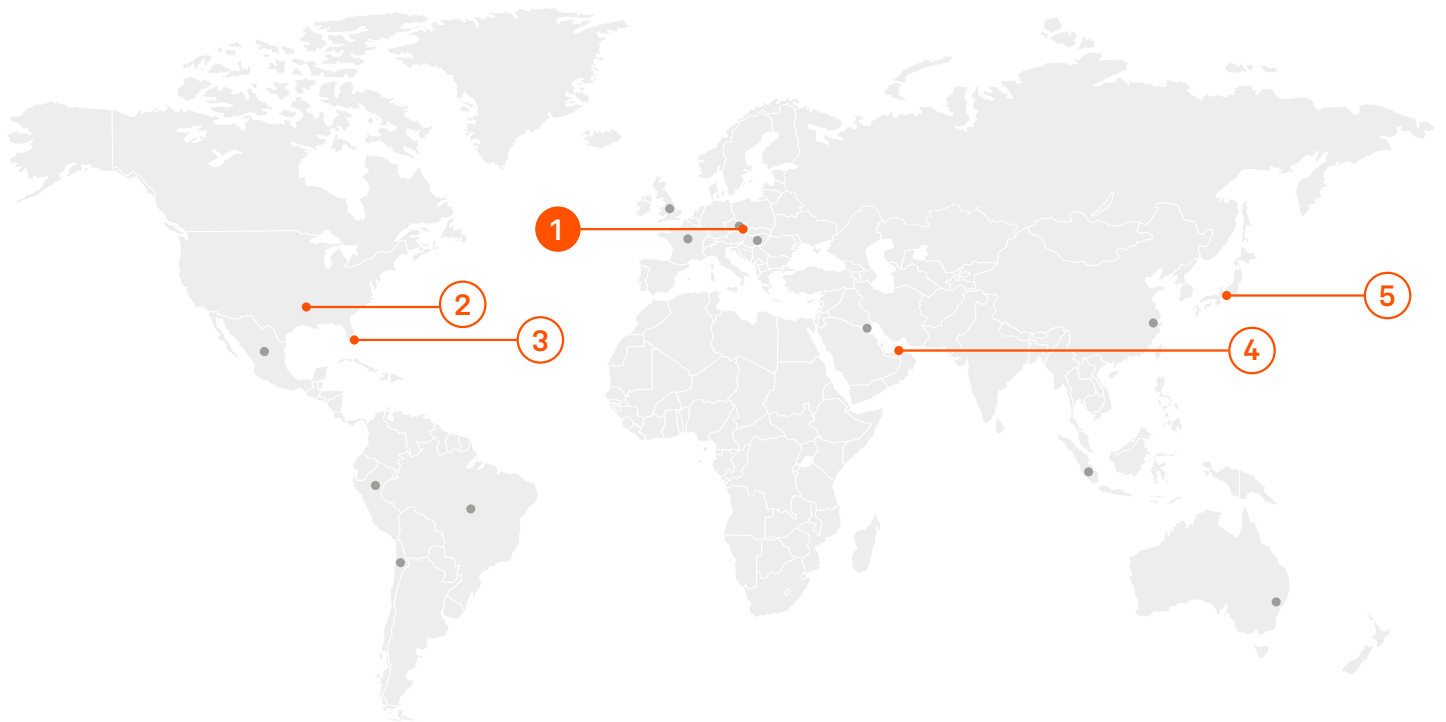
6. USE CASES

Examples of how paper based processes can be transformed into digital workflows are provided on Y Soft's website as [use cases](#).

Use case examples include:

- Accounting firm – processing client documents
- Bank – new account creation
- Educational certification center – processing test results
- Government agency – preserving government documents
- Medical – processing test results
- Pest control company – processing completed job forms into the billing system

LOCATIONS



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For a complete list of more than seventeen countries and locations, please visit our website.



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