Document Imaging
Convert Paper to Electronic Documents for Easy Storage & Access

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For financial service providers looking to improve and streamline access to business critical documents, reduce costs, and demonstrate greater adherence to compliance regulations, it makes sense to convert paper-based files into electronic documents.

Time spent searching for and organizing incomplete files, the inability to efficiently address customer inquiries, and excessive reprinting costs are common complaints from organizations that keep their important business information stored as hard copies.

Today, companies are looking to eliminate reprinting, reduce the time staff spend searching for files, and rid themselves of out of date, inefficient, and costly paperbased archiving systems.

Controlled, secure, web-based access to electronic copies of documents across multiple locations is imperative to businesses who want to remain competitive and compliant while reducing costs and improving performance.

DOCUMENT IMAGING

Document imaging refers to the process of capturing any paper document by scanning, indexing it, and then electronically filing it in an online repository. By converting hard copies into electronic documents, organizations can easily provide cross-branch access to documents from a secure, web-based repository where all customer documentation, including statements, checks, confirms, loan documents, and Know Your Customer files can be securely filed together for immediate access by authorized personnel.

Key Points

- Get scanning quickly with an easy-to-use, intuitive user interface

- Scan, index, and save critical business documents in batches with production level capture software

- Archive documents easily with powerful bar code management tools

- Provide cross-branch access to scanned documents from a secure, web-based repository

DOXIM DOCUMENT IMAGING

Doxim Document Imaging is a production level capture software that combines robust document scanning and indexing tools with a friendly user interface that allows users to easily scan, index, and save critical business documents to a centralized document repository.

KEY FEATURES

- Quick to set up, configure, and use
- Easy-to-use, intuitive user interface
- Database lookup for auto indexing
- OCR (optical character recognition) support
- Separator page management for multi-document batches
- Missing form/document alerts
- Powerful bar code management
- Available XML Meta data support

By implementing Doxim Document Imaging to scan, index, and archive hardcopy documents, businesses can:

Reduce Costs

- Improve employee efficiency – no need to retrieve hard copy documents from filing every time you get a customer service inquiry
- Significantly reduce paper usage and handling – reduce the need to reprint documents and eliminate the need to fax documents between branches
- Automate and streamline all paper-based processes by moving them online and leveraging the electronic workflow capabilities in your document repository
- Save on storage costs and the expense of retrieving documents from off-site storage locations when needed
- Leverage the Doxim Enterprise Content Manager (ECM) repository for online document storage

Increase Information Security

- Eliminate unsecure, paper-based filing systems that can be accessed by unauthorized personnel by converting all paper documents into electronic files for secure online storage and permission based access

Improve Disaster Recovery/Business Continuity

- Avoid the potentially devastating consequences of losing all your customer files in a fire or flood by scanning and storing all these documents online in a secure electronic repository
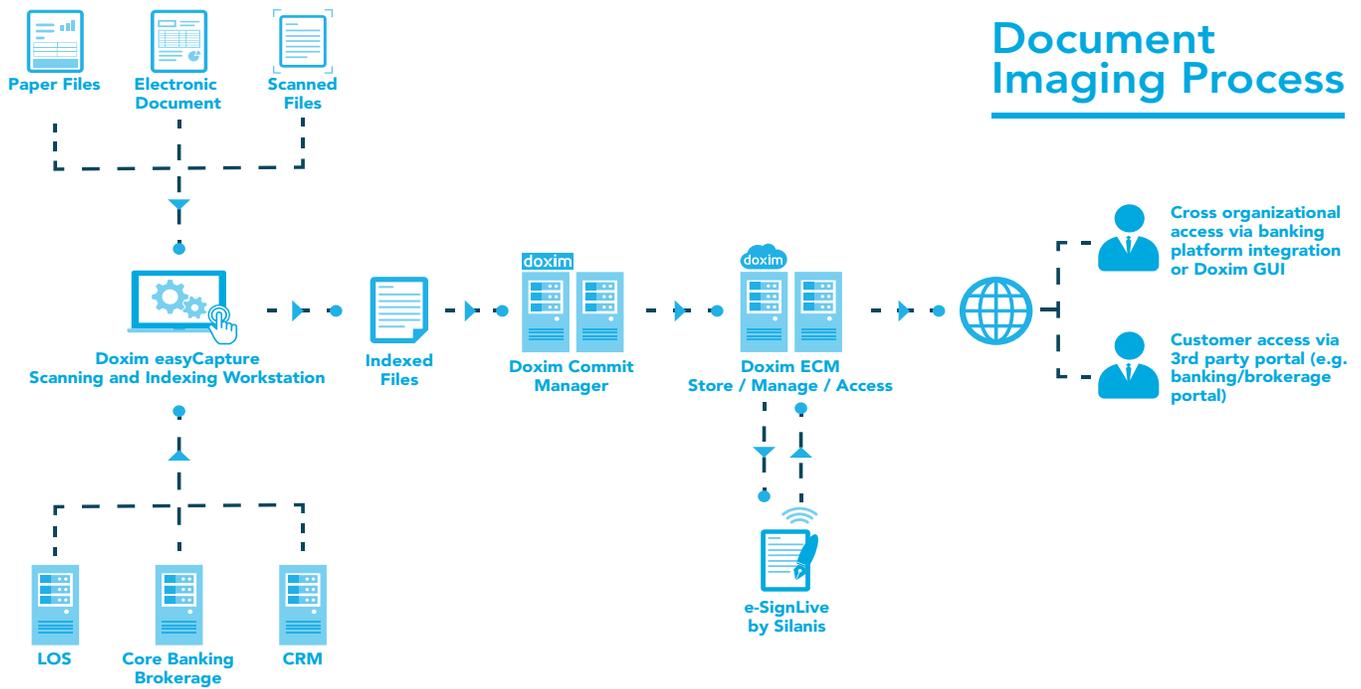
Improve Fraud Prevention

- Streamline adherence to FINTRAC/ FINCEN regulations by putting all Know Your Customer information online for easy yet secure cross-branch access by all authorized personnel

Improve Staff Efficiency/ Customer Service

- Ensure all authorized personnel have ready access to all documents online, so they can respond more efficiently customer inquiries versus continually having to retrieve documents from hard copy filing
- Eliminate the need for staff to make requests across different locations for hard copy documents to be faxed, mailed, or couriered between locations to respond to customer inquiries
- Provide secure, permissions controlled access to all up-to-date business documents from a centralized repository, regardless of where they were originally created

Improve Compliance

- Improve your ability to control, monitor, and report on document access (who accessed what document and when) and prove that you are doing this consistently
- Demonstrate that you have robust disaster recovery and business continuity strategies in place for all your business critical documents
- Establish robust access permissions and controls for securities documents, where access restrictions are enforced by the Securities Commission

Document Imaging Process

Paper Files

Electronic Document

Scanned Files

Doxim easyCapture
Scanning and Indexing Workstation

Indexed Files

Doxim Commit Manager

Doxim ECM
Store / Manage / Access

LOS

Core Banking Brokerage

CRM

e-SignLive by Silanis

Cross organizational access via banking platform integration or Doxim GUI

Customer access via 3rd party portal (e.g. banking/brokerage portal)

- Enhance your ability to have 'clean' audits by significantly reducing/eliminating misplaced, misfiled or lost documents
- Provide auditors with the option to access all audit documents remotely by establishing a secure Auditor view into your online document repository

Doxim Document Imaging is an important part of the Doxim ECM suite of products. Doxim ECM can be used to store and manage all of your documents and other digital content and makes that data easily accessible to authorized personnel across the company in electronic formats. It serves as an important part of an effective disaster recovery and business continuity strategy and enables compliance with today's stringent regulatory obligations.

Connect with Doxim

Learn how Doxim Document Imaging can help your organization go paperless, saving time and money and reducing your carbon footprint.

doxim
TRANSFORMING CUSTOMER EXPERIENCE

- Serving over 1,500 financial institutions across North America
- Recognized as one of the fastest-growing technology companies in the market for the past 9 years