

On-Premises or Cloud-based Document Management

A secure, user-friendly document management and business process automation suite.

For an organization to be efficient and agile, managers and employees must be able to work with mission-critical data anywhere; at home or on the road, at their desk or on vacation. But, traditional filing systems – paper documents, shared drives, personal hard drives – are rife with hassles, headaches, risks and expense. PSIsafe is a centralized repository where all documents are accessed and managed, eliminating the inefficiencies of filing cabinets, shared drives and local hard drives. PSIsafe...

- ▶ Streamlines overflowing paperwork through simple workflows, easy sharing of documents with non-PSIsafe users, and automated document set creation.
- ▶ Provides an effortless implementation & ease of use with both On Premise and Cloud implementations. The simple user interface is easy to learn and allows for fast user adoption, immediately increasing efficiencies for your business.
- ▶ Supports granular security features such as 128-bit encrypted file transfer, 256-bit encrypted data storage, automatic expirations for documents, and encrypted salted passwords for maximum protection.

Along with the capabilities mentioned above, PSIsafe also has a mobile application, 3rd party Integrations (Redtail, SalesForce, etc), Document Change Scheduling, and Forms Management and much more. Setup (for either Cloud or On-premise) is a flexible installation, allowing for the creation of a tailored solution for any organization.

Work the way you want with **PSIsafe**.



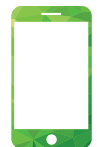
Cloud



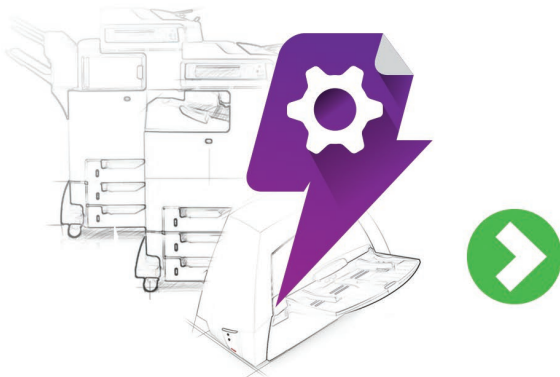
Premise



Web



Mobile



Capture documents from direct-connect scanners, import from network folders, existing databases or fax servers. Harness PSIsafe's architecture for interactive or automated processing.



PSIsafe's flexible workflows route documents based on your business rules with complete audit trail and document tracking to automate and expedite any process.



Documents are securely stored in On-Premise or Cloud deployments of PSIsafe. Integrations with your HRIS, accounting, CRM and other systems help to maximize your investment.

Work the way you want with PSIsafe.

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

Effortless Document Management with PSIsafe

▶ True Business Automation

Do more with File Change Scheduling, Effortless Sharing of docs with non-users, Automated workflows, and Forms Management

▶ Mobile Document Management

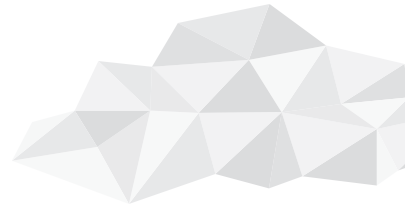
Access client information during an off-site meeting or collect a legal signature from your phone or tablet.

▶ Windows Document Retrieval

Make the mission-critical documents stored in PSIsafe accessible in nearly all Windows-based enterprise applications without losing security, audit trails and version controls.

▶ Third-Party Integration

PSIsafe's open API gives clients, partners and OEMs the ability to safely and confidently integrate third-party applications to create firm-wide interoperable document management workflows.



System Requirements (PSIsafe and PSIsafe Cloud)

OPERATING SYSTEMS

- » Windows 7 (x86/x64)
- » Windows 8 (x86/x64)
- » Windows 10 (x86/x64)

SOFTWARE REQUIREMENTS

- » .NET 4.6.1 Framework

HARDWARE REQUIREMENTS

- » 2.0 GHz or higher multi-core processor.
- » 3 GB available memory recommended.
- » 1 GB free disk space.

SERVER (PSIsafe)

- » Windows Server 2008 R2
- » Windows Server 2012
- » Windows Server 2012 R2
- » Microsoft SQL Server 2008 R2
- » Microsoft SQL Server 2012
- » Microsoft SQL Server Express 2008 R2
- » Microsoft SQL Server Express 2012
- » RAID 5 or RAID 10 disk array recommended
- » .NET 4.6.1 Framework