[IMTF]

Digital Process Automation

Hypersuite Folder Manager

- Organize, Process, Share and Govern Information in Electronic Folders
- Store, Exchange, Annotate, Verify and Sign Documents
- Automate Approval Processes
- Search & Find any Document in the Blink of an Eye
- Access Directly what Matters Most
- Digital Mailroom

Excellence in RegTech Solutions

Hypersuite Folder Manager Digital Process Automation

The Hypersuite Folder Manager is organizing, processing, sharing and governing information in electronic folders that can be related to any subject, event, case or process. It is offering intuitive operability, powerful search & viewing functions and easy integration capabilities.

Folder Management, Document Processing and Sharing

The Folder Manager supports any electronic object (document, mail, file) in any format. It allows organizing, processing and sharing objects into folder hierarchies and compound documents within any workspace. The Folder Manager mirrors the different ways in which people are working (e.g., customer or case-centric).

Immediate Access to what Matters Most

The Folder Manager is designed to allow knowledge workers to organize any document type (structured and unstructured data) coming from multiple sources in an electronic folder explicitly dedicated to a customer, case, process, transaction, etc.

All Documents in One Place

By automatically grouping documents, images, eMails, files related to the same topic, users will have access to permanently up-to-date information at any time. This 360-degree view (e.g., of a customer) will benefit the quality and pertinence of any decision-making process.

Unified and Centralized Folder Structure

The Folder Manager offers a unified and consistent structure across the whole organization while meeting the needs of specific departments and/or cross-functional processes, such as:

- Approval processes
- Loan Origination & Processing
- Onboarding / CLM
- Alert investigations
- Legal Case Management, including legal hold
- HR processes

Digital Mailroom

The Folder Manager allows the automation of incoming mail. You may digitize all incoming mail, automate its classification, distribution and processing within your organization.

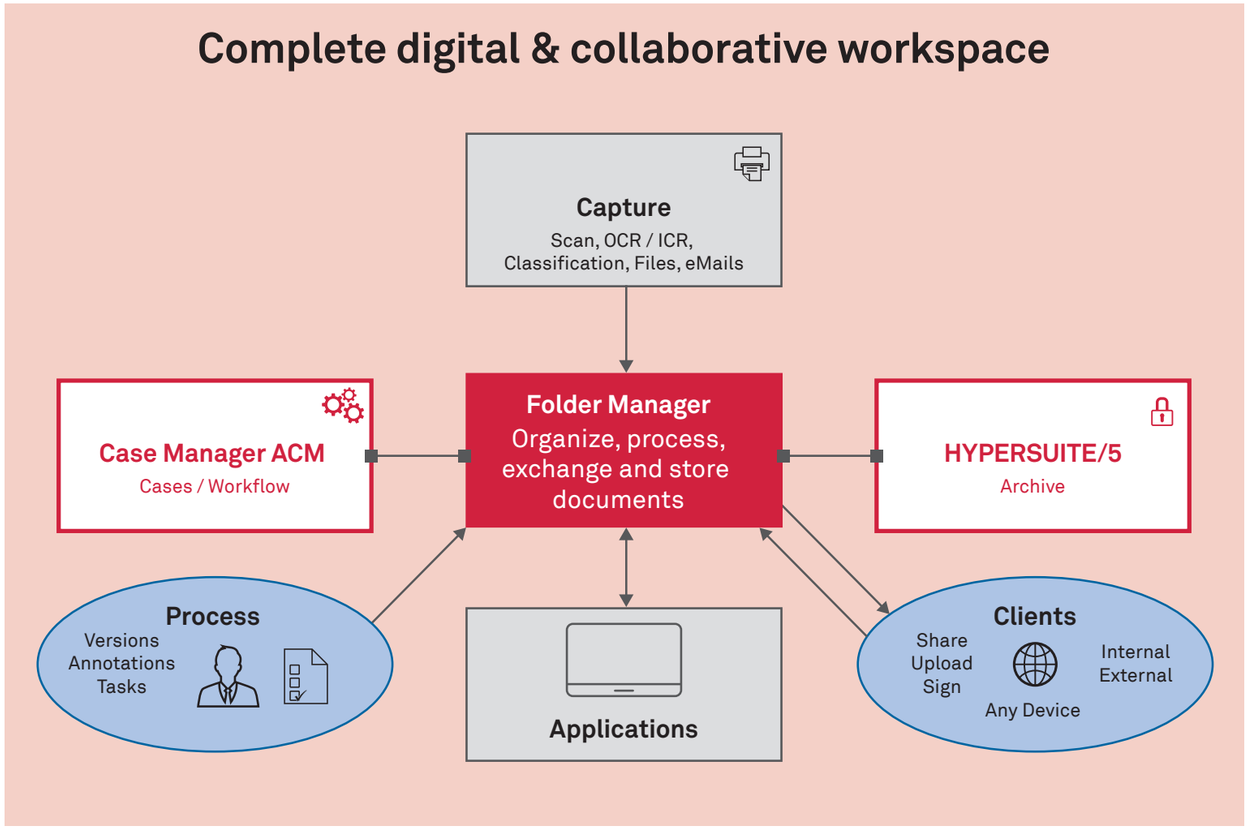
Phone Integration

Inbound calls may automatically trigger the opening of the relevant customer folder allowing immediate access to all available information (including the recording of the call when required).

Omni-Channel Capture, Sharing & Exchange

Documents can be uploaded into the Folder Manager from your local system, a scanner, MFPs and mobile devices. Office documents and emails can be sent to the Folder Manager directly within MS-Office and Outlook. The Folder Manager includes full version control including version detection. The Drag&Drop of documents into the Folder Manager combined with the advanced search functionality make the Folder Manager the most effective virtual working place for information workers.
Optionally, secure sharing and signature is also possible for users outside your organization.

Complete digital & collaborative workspace



Federation

The Folder Manager allows the federation of other systems (e.g., Archives, CRMs, etc.) providing a full 360-degree view on all information available throughout your organization.

Integration / Web Services

The Folder Manager Integration Layer offers fully flexible and state-of-the-art REST API services, allowing 3rd-party applications to easily integrate and make use of the full functionality for files and folders (add, rename, delete, download, versioning, move, archive, deliver, view, read metadata, update metadata, sign, etc.).

Document Manipulation, Annotations & Composition

Users can annotate documents (text, highlighting, signatures, images, etc.). Additionally, the composer feature allows document splitting, page rotation, page move, page deletion, and more. This is a time-saving feature when compared to manual work performed before the scanning.

Security and Information Protection

Granular content protection is standard: by dossier, document type, case, policy or any combination.
Further features are:

- Granular access control (metadata, roles, etc.) including permission management
- Guarantee of content immutability (encryption and/or digital signature)
- Segregation of administration & configuration roles

Full-text Search and Viewing

Folder Manager Search allows intuitive search for any available information, e.g., metadata and content. Faceted search to narrow down search results by applying multiple filters is also standard. Multiple taxonomies can be associated to a folder or document independently from its physical (storage) location avoiding the creation of multiple copies. The documents found are displayed in a multi-format viewer; pre-views and automatic conversions are fully supported.

Secure Communication, Exchange & Approval

The Folder Manager allows to securely and effectively exchange information with users and external parties. Notifications (eMail, SMS) are automatically triggered to the relevant stakeholder when a customer has uploaded a (signed) contract. Customers are alerted when their respective documents have been updated or reviewed. Access rights grant for compliant (e.g., GDPR) consent and authorizations.

Rule Engine

The embedded Rule Engine allows the automation of many use cases. Rules may trigger or read events to / from other systems, like defining how to dispatch documents to a specific folder. Rules may also trigger the kind of notification (application, email, SMS) which is required or the next best action (e.g., archive automatically all documents or only some specific types). The Rule Engine combined with the full-text search allows powerful e-Discovery proceedings (e-Discovery Reference Model).

Other Key Functionalities

- Rule-based archiving to IMTF's or any 3rd-party system
- Full Integration of authoring tools such as MS-Office.
- Document annotations & history viewable by other users
- Drag&Drop of documents/folders with File Explorer between users' desktop and the Folder Manager
- Emailing to and from the Folder Manager
- Complete audit trail

Folder Manager at a Glance:

- Immediate access to what matters most
- Flexible folder structure (individual to centralized)
- Full text search
- Convenient, secure and compliant
- Document approval and eSignature
- Comprehensive access control
- Powerful integration layer
- Complete & exportable audit trail
- HYPERSUITE/5 Archive plug-in
- Automated case creation
- Digital Mailroom function

The HYPERSUITE Platform:

HYPERSUITE supports **legal archiving** and its **Folder and Case Management (ACM)** capabilities allow you to **address all your business and IT needs for compliant content, and digital process automation.**

HYPERSUITE manages content through its **entire lifecycle** in a **secure and regulatory compliant** way: capture, process, publish, archive and dispose with comprehensive records and retention management.

Working in a **multi-country and multi-agency** environment with several distributed branch offices around the world, HYPERSUITE is able to support legal requirements according to location, country, region or any other legal entity or jurisdiction.

HYPERSUITE supports **centralized configuration** and management of **multiple legal entities, multi-domicile, multi-jurisdiction** via a single instance (MESI) and is a **cloud ready** application.

The IMTF Difference

- Top-ranked RegTech trendsetter, turning ideas into products
- Experts in developing automated banking processes
- 100% focus on Compliance and Digital Process Automation for Financial Service Providers
- Swiss excellence with a global perspective
- Flexible, customized and effective approach

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