



# **DocUnity Document Workflow**

DocUnity Document Management & Workflow, a fully integrated ProcessPro solution, is a secure, easy to use document management system. Our goal is to reduce your costs by automating paper-based tasks and thereby improving productivity. All companies have paper and digital documents. DocUnity captures, organizes, secures and manages them all in a single SQL database. DocUnity is scalable for companies of all sizes, from a few users in a small department to a company-wide installation.

### **ProcessPro Document Retrieval Integration:**

The DocUnity Document Launch button can be added to any ProcessPro Window. The most immediate impact DocUnity has on any organization is how quickly it can retrieve documents. Without leaving ProcessPro, you can find the documents you need in moments.

DocUnity is completely configurable, giving you the ability to add any document and to identify it by any keywords you wish, such as P.O. or Invoice Number. Most of the ProcessPro documents and keywords you will use have already been created in DocUnity and are ready for use. Another key advantage is the ability to automatically link transactional documents together so that they can be simultaneously viewed for comparative and research purposes.

### **Document Workflow:**

DocUnity's Workflow Software allows you to spend less time managing documents and more time focusing on your business.

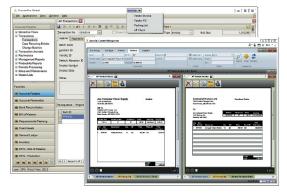
Creating workflows for AP, Purchasing, HR, or any task is simple. A user can tailor the approval process to fit specific requirements. Single or multi-step approvals based on various requirements are easily be created. Documents are automatically routed to the 1<sup>st</sup> level approver for delivery, price and quantity verification, authorizations, etc. and then routed or emailed to the appropriate manager for final approval.

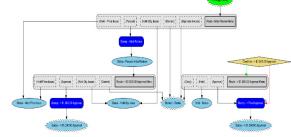
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#### DocUnity Document Management

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### AP Invoice Transaction Data Transferred into ProcessPro:

DocUnity uses the data printed on the vendor invoice as well as data it extracts from ProcessPro to enter your AP Transactions. After documents have been approved for payment and the GL posting approved simply select the "Enter AP Transactions" button in DocUnity and the data is ready to import into ProcessPro. A complete history of all transactions in maintained with the invoice as well as in DocUnity.

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The AP data is imported into ProcessPro utilizing the standard ProcessPro AP logic & controls.

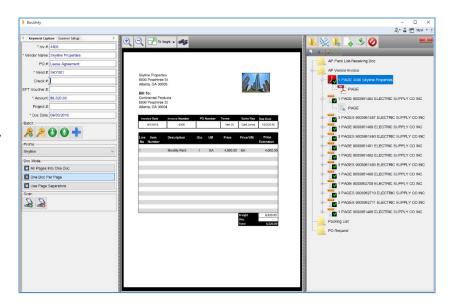
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## **Document Capture:**

DocUnity provides a complete document capture solution that optimizes speed and accuracy while requiring minimal user intervention.

Documents can be captured from a variety of sources:

- Scanned paper forms and documents are turned into efficient digital documents through Optical Character Recognition technology.
- Any type of digital file or document that originates as a fax or email can be easily imported.



- All ProcessPro generated documents or forms (AP & Payroll checks, invoices, statements, etc.) are automatically captured and saved in DocUnity and are matched to related documents.
- ProcessPro Reports are selectively saved in a similar manner.



