Xerox DocuShare CPX Enterprise Content and Process Manager

Integrating Content, People, and Processes

Enterprise Content Management (ECM) applications help organizations gain control of information by automating processes, reducing replication of content, and ensuring the right people receive the right data for faster response and better decision making. However, gaining control of vast quantities of paper and digital documents is just one part of increasing productivity in the enterprise. Achieving peak levels of responsiveness requires businesses to automate how documents move through the organization and how they interact with and are changed by team members and business process managers.

From invoices to contracts to reports, to emailed approvals and communications, the information contained in documents drives the “transactional” business processes that are central to daily operations and productivity. Proactively automating this valuable information results in a more nimble, accountable, and competitive enterprise.

Meeting the Next Challenge of Enterprise Content Management

Xerox DocuShare CPX is a scalable Web-based application that offers a feature-rich toolset for applying business process management with minimal IT support and training. This next-generation application allows process managers to easily automate the handling or review of content passing through or generated by business processes using intuitive content rules instead of intensive IT programming and configuration.

In this way, DocuShare CPX empowers the enterprise to leverage the content that fuels its transactional business functions—contracts, invoices, applications, and forms—more effectively and with greater flexibility than ever before.

DocuShare CPX further supports business process management by offering a wide variety of interfaces to upload scanned images. This allows organizations to rapidly capture paper documents and bring them into automated processes for end-to-end information control.

These advanced content, imaging, and process management features enable managers to easily establish and link document-centric business processes into the larger document, content, and records management strategy of the enterprise. DocuShare CPX supports the automation of a number of critical ECM needs, including image capture, document management, business collaboration, content automation, as well as compliance and records management—introducing companies to a new level of flexibility in ECM at an affordable price.
Accelerating High-Value, Document-Centric Business Processes

DocuShare CPX extends core DocuShare technology to deliver an expanded set of advanced capabilities that allow organizations to rapidly realize faster, more effective collaboration, increased efficiency, and greater information access at all points of the enterprise.

Basic Content Services and Advanced Content Management

DocuShare CPX offers the Basic Content Services (BCS) required to support and empower knowledge workers throughout the organization, while its advanced content management features allow teams to engage in more sophisticated content management functions as required. From the first day of installation, DocuShare CPX boasts an industry-leading BCS feature set that ensures greater personal productivity for every user.

- Core content library features, such as version control, check-in/check-out, and routing and approval enables easy document management and ad hoc collaboration
- Easy user access and usability through any standard Web browser using a simple Internet connection—no specialized client software required
- Rapid incorporation of content from multiple sources via the Content Intake Manager supports ingestion of diverse content types and sophisticated workflows
- High-performance imaging with capture rates of over 350 images per minute in continuous operation mode
- “Guest” and “Read-Only” access supports Web information publishing for external and internal constituents
- Audit history tracking, query, and reporting supports compliance and security
- High-capacity indexing with the Autonomy search engine enables fast search and retrieval
- New server-based OCR option converts imaged documents into indexed files that can be searched and edited
- Federated searches across multiple DocuShare servers supports scalability and growth
- Conversion of TIFF files to PDF or Microsoft Excel, and other MS Office documents to PDF, XML, or HTML, keeps content use flexible
- Seamless records management with Xerox DocuShare Records Manager brings ECM and records management into a single, easy to manage user interface

DocuShare CPX in Action—Automating the Employee Application Process

Managers can customize DocuShare CPX to match the way information flows in their organization, enabling them to easily streamline routine processes. A perfect example is the acceptance, acknowledgment, review, and referral of job applications/resumes.

DocuShare CPX can automatically:
- Accept applications with resumes via scanning stations, fax server, or email into a designated DocuShare collection and automatically generate an email acknowledgment to the applicant, and even perform OCR on the resume content to support precise search and matching of applicant experience with job requirements
- Route applications to appropriate hiring managers for multiple jobs
- Distribute applications to the appropriate department and staff for consideration, after review and approval
- Summarize the objectives, experience, or education of numerous applicants in a single, self-updating overview report
- Place the application and resume into an interview collection, if approved for an interview
- Move the application and resume to a hold file if rejected, and mail a response letter to the applicant

DocuShare CPX makes it easy to share ad hoc, everyday business information more efficiently, allowing organizations to minimize or do away with the time, labor, and cost of maintaining paper files. Knowledge workers can rapidly bring diverse content types into a secure, indexed, and searchable repository; share it with others; and effectively manage information for greater personal productivity and greater efficiency across the enterprise.

Content-Centric Collaboration

DocuShare CPX enables any user—regardless of skill set—to easily collaborate on content, while the organization secures and maintains the content for future reference and benefit. With DocuShare CPX, organizations can assemble task-specific information, people, and reference material into centralized workspaces that facilitate access and elevate focus on key business activities and processes. And DocuShare CPX brings the power of collective content authoring and rapid dissemination through blogs and wikis to the enterprise level. This feature includes “What You See Is What You Get” (WYSIWYG) editing for added ease of use.
Once approved, items are published and made available to the public.

Items passing review are staged for approval in a Pending Approval folder to be viewed by the approver.

Documents ready for review are automatically routed to an editor for special tagging and then to a reviewer for quality assurance.

Content rule transfers images either directly to review folder or to an optional OCR module.

Engaging in Process Management with DocuShare CPX

DocuShare CPX offers the advanced ECM functionality necessary for integrating and automating transactional content and applying sophisticated collaboration and business process management to specific tasks, making it an ideal environment for a number of repetitive content processes, including:

- Mortgage loan applications
- Life insurance forms
- Claims processing
- Due diligence support
- Resume/job applications
- Healthcare privacy forms
- Student grade reports
- Jury summons
- Brokerage trading orders/contracts
- Government permits
- Employee evaluations
- SOPs/ISO manuals and handbooks
- Contract renewals
- Accounts payable and receivable
- And much more

Compliance and Auditable History

DocuShare CPX supports compliance and accountability by offering tracking and reporting features that capture all user activity and events that view, touch, or modify DocuShare content or descriptions (metadata). This information is captured for all registered levels of access (Read-Only, DocuShare, CPX) ensuring that the activities of each named user on each piece of content are reliably tracked.

Content Submission and Summary

The DocuShare CPX extensible database (XDB) expands traditional content management capabilities, allowing users to work with data using familiar applications such as Microsoft Excel, and ultimately submit and retrieve data from within those applications. Unlike other XML tools, XDB automatically translates data into a universal structure that is independent of the original application and format. This dynamic XML content translation greatly reduces up-front determination of data structure and allows people to add, modify, report, or update their content without having to modify the underlying XML description each time a change occurs.

Information stored in XDB is now available for retrieval and reassembly into summary documents of related information. At the same time, legacy documents are maintained in their original format with all metadata, keywords, and access permissions intact. Whether document text, presentation slides, or data ranges from a spreadsheet, XDB converts the information into reusable XML components.

For example, DocuShare CPX can capture common sections (expiration date, assignment clauses, amendment exhibits, etc.) from thousands of contracts—regardless of formatting differences or document type—and create an information summary. This makes it exceptionally easy for knowledge workers and project managers to quickly compile summary due diligence reports on all existing contracts.

Implications of DocuShare CPX in Content Management

- **Increased Efficiency:** By automating the process of content management, DocuShare CPX enables organizations to work more efficiently, reducing manual tasks and minimizing errors.
- **Enhanced Security:** The platform offers robust security features, ensuring that only authorized users can access and modify content.
- **Improved Compliance:** With integrated tracking and reporting capabilities, DocuShare CPX ensures compliance with regulatory requirements.
- **Better Accessibility:** The extensible database allows for flexible access to content, making it easier for users to find and use the information they need.
- **Streamlined Processes:** By automating workflows, DocuShare CPX streamlines processes, reducing the time and effort required for manual tasks.

Content Rules in Action

- **Content Submission:** Users can submit content through various interfaces, including scan cover sheets and email.
- **Document Processing:** Documents are automatically routed to editors for tagging and reviewers for quality assurance.
- **Approval Process:** Items passing review are staged for approval in a Pending Approval folder.
- **Publication:** Once approved, items are published and made available to the public.

DocuShare CPX offers scanning performance capabilities that are significantly greater than previous versions, supporting a wide range of scanning interfaces, including scan to email and support for third-party devices. Using scan cover sheets, workers can rapidly scan multiple documents directly to a pre-existing DocuShare collection or add a version to an existing document. This enables both hard-copy and electronic documents to be captured and controlled through a unified management console and rapidly brought in to larger business processes. Scanning is highly secure yet fully personalized; individuals control the creation and distribution of each scan cover sheet and can revoke usage at any time.

Business Process Automation

DocuShare CPX allows business process managers to establish content rules that determine how content moves through an organization. For example, these rules can trigger a series of easily predefined actions automatically when they add or modify documents in a DocuShare collection. When used in conjunction with image capture, scan cover sheet capabilities, and the built-in Email Agent, it allows individuals to submit content via a broad range of scanning interfaces or email and have that content initiate a complex process. Process managers can even establish rules for exporting documents downstream, creating links to third-party applications or processes that require content but live outside the firewall.

Image Scanning and Processing

DocuShare CPX offers scanning performance capabilities that are significantly greater than previous versions, supporting a wide range of scanning interfaces, including scan to email and support for third-party devices. Using scan cover sheets, workers can rapidly scan multiple documents directly to a pre-existing DocuShare collection or add a version to an existing document. This enables both hard-copy and electronic documents to be captured and controlled through a unified management console and rapidly brought in to larger business processes. Scanning is highly secure yet fully personalized; individuals control the creation and distribution of each scan cover sheet and can revoke usage at any time.
DocuShare CPX users are able to query this audit information and produce detailed reports of activity by document, collection, or user. These reports can be viewed in a Web browser, printed, or exported as XML for further reformatting or analysis.

Additionally, DocuShare CPX seamlessly integrates with Xerox DocuShare Records Manager, a capability that is particularly crucial for users responsible for tracking and controlling documents related to Sarbanes-Oxley and other government regulations, as well as Electronic Records Management. It not only simplifies the classification, declaration, and administration of records, but also integrates into existing work activities. As a result, users will likely declare more documents as records, leading to greater compliance and efficiency.

**Powerful Functionality for the Extended Enterprise**

**Portal Enablement.** Integration with multiple Web portal systems, including Microsoft Office SharePoint Server 2007 and JSR/168 compliant portals (JBoss, BEA, WebSphere, Oracle Portal, etc.). This ensures easy Web browser access to DocuShare CPX content and processes through familiar departmental and corporate portal interfaces.

**Multiple User Levels.** DocuShare CPX now offers any combination of Guest, Read-Only, full DocuShare, and full CPX user levels on a single server instance. This allows DocuShare CPX to deliver targeted, cost-effective, and appropriate content management capabilities to the entire enterprise. Any or all levels of user access are able to gracefully scale across their entire user community while providing access that is precisely aligned to functional requirements and operational needs.

Xerox DocuShare CPX is a flexible, highly-scalable application that empowers the enterprise to more efficiently capture, automate, and leverage the content that drives its critical business functions.

All DocuShare products are built on the Xerox Enterprise Content Platform, a highly-scalable Java 2EE application designed for large volumes of content, users, and traffic. This common and easily extensible platform empowers organizations to rapidly broaden their DocuShare installation to include both DocuShare and DocuShare CPX on the same server instance, and through the addition of unlimited users with flexible levels of access. Upgrading users to higher levels of access or moving from a basic DocuShare installation to DocuShare CPX can be accomplished through a simple license key, eliminating the need to migrate content or endure system downtime or service interruption. Imagine the possibilities.

Xerox DocuShare is a proven technology that has been deployed to thousands of customers worldwide. DocuShare comes from Xerox Global Services, a leader in imaging and document management offering deep and validated experience through world-class services, deployment, and support.