



DOCUMENT TRACKING SOLUTIONS BRIEF

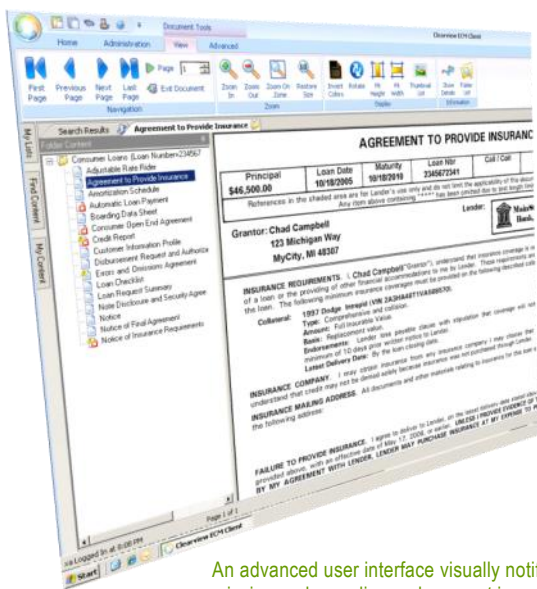
ENTERPRISE CONTENT MANAGEMENT WITH BUILT-IN DOCUMENT TRACKING



The advanced design of Clearview provides a rich set of features to secure and validate document accuracy, completeness of files, and appropriate location. From checking for signatures on loan documents to visual alerts for missing documents during file access, automated system reports, and notifications of missing documents for exception resolution, Clearview provides the tracking tools you need to aid in your compliance, regulatory, or corporate governance initiatives.

See how the advanced functionality of Clearview solves your document tracking challenges:

- ∴ As documents are being scanned, the system can actually examine the physical documents to make sure that they are all signed and dated in the correct location. This eliminates the need to manually check each document for its signature or date—Clearview does that automatically for you at document capture time.
- ∴ Next, as the documents are brought into Clearview for storage, our unique iFolders feature enables you to establish a document set, or list of documents that should be included in each file, along with rules that control the specific documents required in each file folder type. The defined document set is very flexible and can be different for each type of folder that is created.

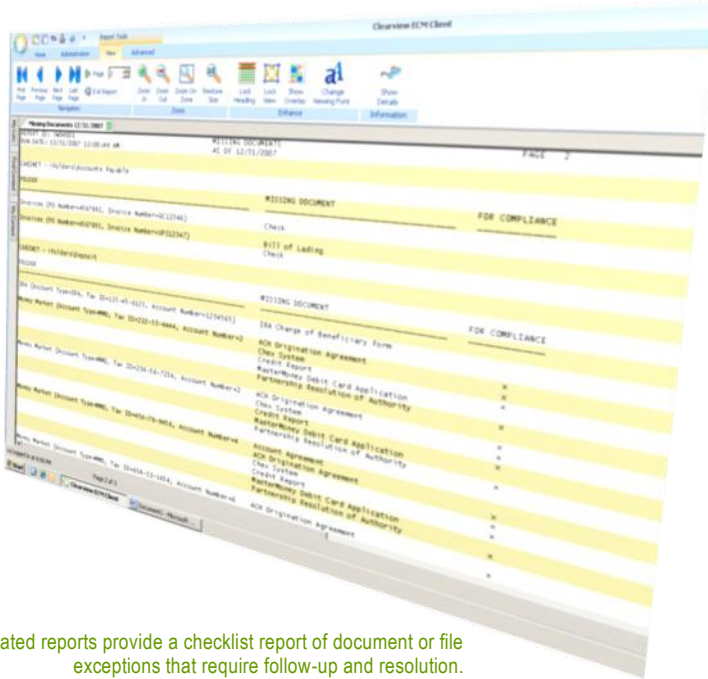
For example, a mortgage file can have a set of required documents that might be different from the contents of a consumer loan file, commercial loan file, or even a checking account file. It can even be as detailed as having different document sets required for various types of loans (e.g., Conventional, Fixed, or ARM). You then have the ability to establish another flag for the documents that highlights them as “compliance-related”— this provides additional visibility and alerts to those documents that have the utmost criticality to your organization. These features combined enable you to control, track, and report on the specific documents required and maintained within each folder.



- ∴ As information workers retrieve and use the iFolders (see screenshot at left), they are presented with a series of visual alerts for documents and exception conditions in the folder. The Missing Documents alert  immediately notifies the worker that a required document is missing from the folder. The worker may then take immediate action to remedy the situation.
- ∴ Another visual alert is a Compliance Document alert  to visually denote that the document (while either present or missing) is a compliance-related document to your organization.

An advanced user interface visually notifies information workers to missing and compliance document issues during file folder access.

Changing the way you see Enterprise Content Management



System-generated reports provide a checklist report of document or file exceptions that require follow-up and resolution.

- ∴ To continue the cycle of document tracking, Clearview creates system-generated reports that automatically audit each folder, compare the documents present in the system to the document set required for that folder type (account or loan), and generate a physical report that provides a checklist of folders that have exception conditions and require follow up. Missing Documents, Missing Reports, and Compliance Audit reports are all made available by the native system reporting feature within Clearview.
- ∴ Finally, by using the My Subscriptions feature, information workers receive automatic email notifications as soon as new exception and compliance reports are created. Following corrective actions, users can leverage the electronic sign-off feature (Report Review) to record completion and resolution of the exception conditions. Additionally, Clearview automatically records the identification of the reviewer and date and time that the report was reviewed and completed, and notes all elements into the audit file to provide comprehensive documented evidence at examination or audit time.

The Clearview Difference

Combined with a superior commitment to customer satisfaction from each and every Clearview employee, you are guaranteed a successful implementation and return on your solution investment for many years to come.

No other vendor can bring you the combined power of experience, technology, and innovative agile solutions delivered with a company-wide commitment to total Customer satisfaction. That is the Clearview difference.

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About Clearview

Clearview is the premier innovator of next-generation SharePoint-based Enterprise Content Management (ECM) solutions designed for today's demanding business world. Our leadership team combines years of experience with the latest Microsoft technology architecture and innovation to bring to market a new standard of excellence for ECM solutions, services, and Customer care.

To learn more about Clearview, please visit www.clearviewecm.com



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