

Invantage Documents is a fully featured, browser-based document management system that incorporates workflow and forms processing. Documents will provide your business with a document and knowledge repository for any format of electronically held or scanned data.

Any document can be securely viewed by an authorised user from any location. This includes output from computers, including inward and outward email and letters, all automatically filed into a structured company electronic filing system.

Invantage Documents can help you to:

- **Cut costs through greater automation and improved workflow**
- **Meet regulatory, compliance and auditing obligations**
- **Reduce duplication and storage space**
- **Gain faster access to stored documents**
- **View documents from multiple locations**
- **Maintain full version control, change history and an audit trail**
- **Ensure business continuity via a complete back-up of all documentation**

The storage, archiving and timely retrieval of documentation are issues facing all firms in the financial services sector. Not only does documentation take up expensive space, it also requires costly resources to file and retrieve it. Financial institutions need quick and easy access to client information in case of queries by the client, management or the regulators. Whilst the client's requirement is the receipt of clear documentation (whether it be statements, valuations, commentary or other material), the regulator's focus is firmly on the business methodologies and the safeguards employed,

along with evidence of robust and auditable processes. To address these issues, Investmaster's solution is Invantage Documents, an enterprise-wide, highly scalable product that provides full document management facilities including cataloguing, collation, storage, and document association. All of these features are proven in the financial services industry and can be tailored to meet the specific needs of a business. Furthermore, if you need sophisticated report writing, document decomposition and reformatting, production management and distribution capability; this can be provided by Invantage Reporter which seamlessly integrates with Documents.

Invantage Documents brings important benefits to key areas of your business, including:

Compliance

- Proof to regulators that clients are being treated fairly and consistently
- Providing rapid responses to client documentation requests from the regulators
- Efficient handling of client queries and complaints
- A clear audit trail, including version control and change history, making it easy for a firm to carry out internal monitoring of its own activities

Operations

- Controlled costs and increased efficiency by reducing the need for costly storage space
- Enabling an organisation to serve more clients without the need to increase staff numbers
- Efficiently managing workflows and resource allocation
- Easily accessing client documents from multiple locations
- Storing a full back up in the event of a disaster

Front Office

- Improved client servicing – easy access to client documentation makes it possible to respond to client queries efficiently and consistently
- Rapid adoption of the application due to the simple and intuitive user interface
- An intelligent and automated filing system
- Full text and index based searching

Easy to Adopt

Documents is the 'thinnest' fully functional and automated document management system available. No downloads or client software are required and there is no need for a complex multi-server distributed architecture and its associated costs. Even large images (Gigabytes in size) can be viewed rapidly over a dial-up connection. Documents fits easily into your business and is designed to suit your needs.