

Ultimus DPA Suite and SharePoint



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ULTIMUS[®]
COMPOSED PROCESS SOLUTIONS

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Introduction

Microsoft SharePoint is a widely used technology, present in nearly 80% of corporate IT environments. While popular for collaboration, intranet, and document management, SharePoint has limitations in enterprise business process use cases that cause profound problems in common, real-world situations.

Ultimus Digital Process Automation Suite provides a variety of ways to overcome these limitations and leverage SharePoint's strengths. In fact, the patented Ultimus DPA Suite is one of the most robust, feature-rich, and proven tools for creating structured and unstructured human- and document-centric process applications – applications that fulfill the most sophisticated, mission-critical, and large-scale organizational requirements.

Built-in Document Capabilities

In addition to unmatched routing, task assignment, notification, escalation, and exception handling options and features, Ultimus DPA Suite provides configurable out-of-the-box document management capabilities that handle every document-centric process need.

The screenshot displays the Ultimus DPA Suite interface. The main content area shows a table of document uploads for a 'Car Loan' request. The table has columns for document type, quantity, upload status, verification status, review status, and notarization status. A tooltip is visible over the 'Car Loan' document entry, indicating a successful verification match.

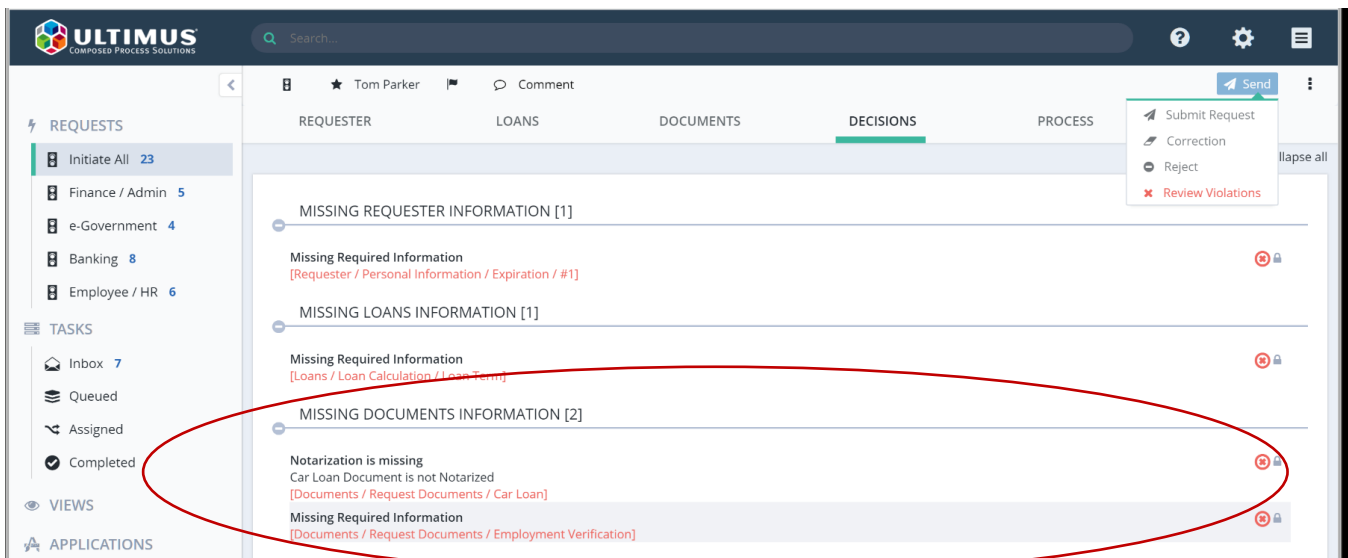
Document Type	Count	Uploaded	Verified	Reviewed	Notarized	Comments
Identification Document	(2)	📄	✅	✅		Tom Parker 21 Apr 2018 16:59 1
Proof Of Address	(1)	📄	✅	❌		0
Employment Verification	(1)	📄	✅	✅		0
Car Loan	(1)	📄	✅	⏸	🛡	0

Car Loan Application [2018-03-03 18:16:18].pdf

Verification with Tierion initiated
2018-03-03 18:16
Verification result
MATCH

A loan approval process showing built-in, intuitive document functionality.

These highly intuitive built-in document capabilities include document checklists; document upload/download/viewing; document generation; user document review, verification, and commenting; document validations and rules; histories of document-related activity; document blockchain anchoring/proving; document reuse; file name/business concept mapping; and integration with SharePoint and other popular ECM systems.



Ultimus DPA Suite's document rules and validations are built-in and automatic.

SharePoint Integration

Ultimus DPA Suite offers three powerful, pre-built SharePoint and ECM integration options that cover the full range of requirements:

- CPS Adapters for form-level interaction with SharePoint;
- Ultimus Flobots™, our unique point and click trainable rapid integration “workflow robots”, for process-level automated activities and background tasks such as storing and retrieving documents from SharePoint, attaching documents to cases and process incidents, and attaching documents to automatically generated emails, SMS messages, or other notifications; and
- Ultimus EIK/Web Service that allows Ultimus functionality to be deployed in custom SharePoint solutions.

The image displays the Ultimus DPA Suite interface, which is used for document processing and verification. The top section shows a request for a 'Car Loan' with a 'Documents' tab selected. A table lists the documents and their status:

Document Name	Uploaded	Verified	Reviewed	Notarized	Comments
Identification Document	(2)	✓	✓		Tom Parker 21 Apr 2018 16:59 1
Proof Of Address	(1)	✓	✗		0
Employment Verification	(1)	✓	✓		0
Car Loan	(1)	✓	○	✓	0

A tooltip for the 'Car Loan Application [2018-03-03 18:16:18].pdf' document shows: 'Verification with Tierion initiated 2018-03-03 18:16' and 'Verification result MATCH'.

Below the document list is a process flow diagram with steps: CPU Validation, Pricing Deviation, Post Approval, Operation, J_End, Store Documents, and End. A red arrow points from the document tooltip to the 'Store Documents' step.

The bottom section shows a SharePoint interface with a document library named 'Documents' containing a folder 'Car Loan' with an 'Incident 141' sub-folder. A table lists the documents stored in this folder:

Name	Modified	Modified By
Address Verification.pdf	Yesterday at 10:17 PM	Joachim
Car Loan Application [2018-03-03 18-16-18].pdf	Yesterday at 10:13 PM	Joachim
Driver License.pdf	Yesterday at 10:19 PM	Joachim
Employment Verification.pdf	Yesterday at 10:14 PM	Joachim
ID Card.pdf	Yesterday at 10:18 PM	Joachim

Red arrows indicate the flow from the document in the Ultimus interface to its storage in the SharePoint document library.

Example of automatic document storage in SharePoint.

Benefits:

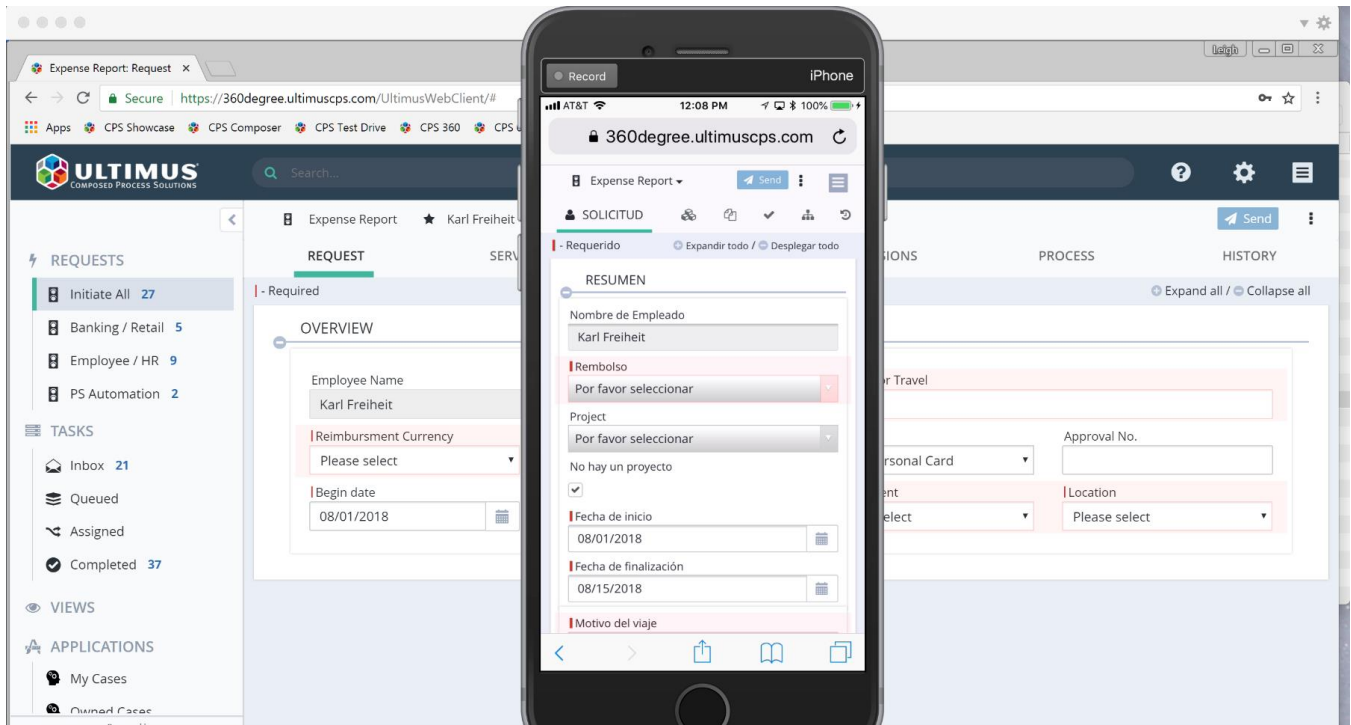
Ultimus DPA Suite gives organizations the best of all worlds: The ability to develop powerful, flexible, and highly-intuitive business process software applications with incredible speed while easily leveraging SharePoint's powerful "system of record" capabilities.

Ultimus SharePoint integration strategy maximizes business agility, effectiveness, efficiency, and customer experience by:

- Eliminating costly, complex, and inflexible SharePoint customizations;
- Speeding delivery with powerful, pre-built document functionality optimized for usability;
- Eliminating fragile, inflexible, and unreliable point integrations;
- Facilitating document reuse, traceability, and verification;
- Replacing isolated solution islands with solution families that inherently work together, share data, and can be managed as one larger application; and
- Enabling pervasive, seamless, enterprise-scale, end-to-end process digitization – across all devices; regional, product, and business scenario permutations.

The screenshot displays the Ultimus Complaint Management interface. The top navigation bar includes the Ultimus logo, a search bar, and user information (ACME User01, BO Compliance Officer, 0120, Comment (3)). The main content area is divided into tabs: COMPLAINT, DOCUMENTS, DECISIONS, PROCESS, and HISTORY. The HISTORY tab is active, showing a timeline of events for the complaint process. The timeline is organized into stages: INITIATE, FOMAKER, and FOCHECKER. Each stage contains a list of events with timestamps and descriptions of actions taken by ACME User01. For example, in the INITIATE stage, a comment was added on 5 February 2019 at 17:03, stating 'Please treat the submitted complaint with high priority', and a task was submitted at the same time. In the FOMAKER stage, a comment was added at 17:05 stating 'Complaint has been reviewed and assessed.', and a file named 'FlagsExcel.xlsx' was uploaded at the same time. In the FOCHECKER stage, a comment was added at 17:07 stating 'Document is missing Customer signature', another comment was added at 17:07 stating 'Complaint has been reviewed and assessed.', and a task was submitted at 17:07. The left sidebar shows navigation options for REQUESTS (Initiate 42), TASKS (Inbox 6, Queued, Assigned, Completed 30), VIEWS, and APPLICATIONS (Complaints Report, Manager Delegation, Wistron Reports). The bottom of the interface indicates it is powered by Ultimus.

Complaint Management process showing out-of-the-box process and document history.



Ultimus DPA solutions are mobile-ready with no additional effort and handle every regional and use case permutation.



Ultimus Flobot™ automated integration agent options.



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