

# Content Management Services

## Electronic File Solution™ (EFS)



### Benefits

- Consolidate systems
- Simplified content management
- Anytime, anywhere access
- Compliance
- Reduce costs
- Secure data
- Mitigate risk
- Easy-to-use
- Rapid implementation

### Features

- Software as a Service (SaaS)
- Retention policy management
- Customizable indexing
- Zero footprint
- Web services
- Multiple search options
- System integration

### Anytime, Anywhere

EFS is a content management toolkit delivered as Software as a Service (SaaS), enabling organizations to capture, archive, retrieve and dispose of any type of data. Organizations can consolidate records stored in multiple content management solutions into Electronic File Solution's centralized secure repository that is easy-to-access from anywhere.

### Flexible

EFS benefits insurance companies across multiple lines of business and can be used by business units throughout your organization. Data from property and casualty, life and annuities, legacy systems and corporate departments, as well as agents, can be transferred into EFS.

EFS can be integrated with other business systems and provides customizable indexing to meet your organization's content storage and retrieval needs. Indexing can vary for each business unit in your organization. EFS supports multiple capture and input capabilities to upload data of any type including electronic documents, e-mail, scan, fax, paper, and legacy system content.

### Secure

EFS provides a hierarchical security system to control access to files by individual and role. EFS can also integrate with your corporate authentication tools (such as single-sign-on) to protect data in the repository from unauthorized access.

### System Consolidation

EFS can consolidate multiple content management systems in your organization. DST streamlines the transfer of data from existing systems into EFS, simplifying consolidation for clients and reducing conversion costs. Centralization of records in the EFS repository reduces the costs incurred to upgrade, license and maintain multiple systems.

### Retention Management and Compliance

EFS provides robust, easy-to-use retention management capabilities that support corporate retention policies and are consistent with regulatory requirements. EFS enables you to set and update retention dates based on document type and event triggers, and supports litigation holds and your organization's eDiscovery activities. Corporate oversight is supported by auditing access and centralizing documents into a single repository.



### Business Uses of EFS

Leverage DST's knowledge and expertise to create an EFS solution that meets your organization's long-term content management needs and helps your business reach its goals.

#### Field sales support

The field sales support functionality in EFS enables remote agents to upload pre-sales and suitability data directly to the EFS repository, which gives the home office visibility and control over their information. Auditing and security features ensure access to documents is restricted and logged, and the EFS system can be integrated with other enterprise content management systems through standard web services.

#### Consolidation of legacy content systems

EFS can be used to consolidate data and images from legacy systems into a single repository. Access is controlled by client-configured permissions associated with a user ID. Once stored, files are unalterable and system controls enable clients to manage retention in accordance with corporate records retention policies.

### How EFS Works

#### Capture/Index

Capture and manage content electronically or physically and store that information in a secure dedicated content repository. With various input methods, such as electronically importing data from your desktop, automated solutions for supporting volume upload through web services or utilizing DST scanning services, EFS provides flexible options for capturing content. Our scanning service utilizes high-speed scanning and imaging technology to convert your company's important business records, including those on legacy systems, into a dedicated repository. Once documents are housed in EFS, images can be classified and indexed according to the criteria you establish.

#### Storage/Security

EFS has a data security protocol designed to protect your records from unauthorized or inappropriate access. Data is housed in a secure facility with 24-hour controlled access that requires electronic and biometric identification for restricted areas. EFS includes secure replication of storage across multiple DST data centers, reducing the risk of data loss associated with single-facility storage of hard-copy records.

#### E-mail archiving

For clients requiring a secure, unalterable repository for e-mail, EFS provides a solution that aligns with regulatory requirements and corporate guidelines for storage. The e-mail archive utilizes the same security and controls as other EFS solutions, providing secure and auditable access to e-mail and related attachments. Litigation holds can be placed on items to indefinitely retain them beyond normal corporate retention guidelines.

#### Reports and statements

Virtually all file formats for reports and statements can be input into EFS. Paper documents, CDs, DVDs, Optical platters and other media can be migrated to the EFS storage platform, which includes a high-availability configuration comprised of two equivalent production environments in two separate data center facilities. Once stored in EFS, all data and images are fully replicated between facilities.

#### Access

EFS provides a secure, online content repository that is accessible from any location using a web browser.

- User-friendly web interface
- Controlled and monitored access based on user-defined criteria
- Utilize a secure account or integrate with existing enterprise security solutions
- Regulatory compliance through controlling and tracking access
- Auditing capabilities produce detailed record access reports
- Share and comment on content over the internet

#### Contact Us

DST Systems is committed to delivering electronic file storage solutions to support your business strategies. Please contact Joel Koehler today at (816) 435-6054 or [EFSinfo@dstsystems.com](mailto:EFSinfo@dstsystems.com) to learn more.



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