By combining Perfectus and SharePoint, organizations can create powerful business solutions that save time, improve quality and reduce risk in document compliance and management.
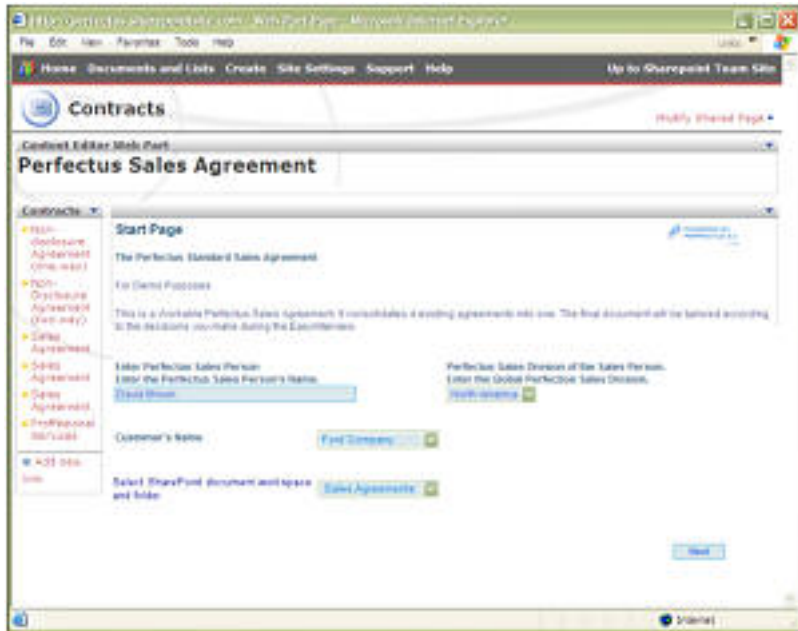

Utilizing the powerful features of SharePoint's collaboration, document management and web management functionality, Perfectus' data capture and document automation software delivers the full document lifecycle process from creating, sharing, processing and storing business-critical information.

Our integration points include:

- **Open/Save Package -** Ability to Open and Save IPManager interview design files in SharePoint document libraries
- **Import/Export Template** - Ability to Import and Export Microsoft Word templates into the IPManager designer from document libraries
- **Outcome Clause Picker** - Provides the ability for an Interview Designer to store document clauses (fragments) in SharePoint document libraries along with rules on how these clauses will be used in assembled documents
- **Interview File Picker** - Allows interview users to select files from SharePoint document libraries which will be inserted into documents at assembly time
- **Interview Folder Picker** - Allows interview users to select a SharePoint document library location to use for storing assembled documents.
- **Fetcher** - A process for extracting any files required during the document assembly process from SharePoint document libraries
- **Distributor** - Ability to set meta-data and distribute documents generated by Perfectus into SharePoint document libraries

- **Publisher Plug-in** - Publishing our interview shortcuts to SharePoint, to enable an EasyInterview to be initiated directly from within a SharePoint portal or application.

Perfectus web-based EasyInterview process