

Vasion FAQ

What is the Vasion platform?

It is an end-to-end, paperless solution that automates your business processes to help eliminate repetitive tasks and simplify document management and auditing, so you can focus on other priorities.

What are the benefits of Vasion?

Vasion gives you the tools to:

- Keep all content secure, yet accessible, raising confidence in compliance and data protection.
- Prevent document mishandling, human error, and missing information.
- Improve overall user experience with a faster turnaround time.
- Reduce labor, printing, and storage costs.
- See our [Vasion Solution Brief](#) for more details.

What automation tools are included?

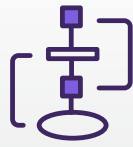
Vasion includes ten applications: five user-based and five administrator-specific. Administrators can assign users certain applications, depending on their role and scope. A general user may only have access to a few applications, like Workspace, Storage, and Forms, while a user with full permissions may see the full platform with all admin applications.

END USER	ADMINISTRATION
<p>WORKSPACE: A dashboard to start, view, monitor, and complete pending Workflows.</p>	<p>WORKFLOWS: Create and automate task sequences to eliminate redundant processes.</p>
<p>CAPTURE: Scan paper documents directly to Workflows or Storage with an installed desktop scanner.</p>	<p>TEMPLATES: Create reusable email and document templates for Workflows.</p>
<p>FORMS: Build digital forms for a Workflow with a no-code, intuitive eForm designer.</p>	<p>AUTOMATION: Schedule various jobs to run at specific times.</p>
<p>SIGNATURE: Send documents for eSignatures and manage sent signature requests.</p>	<p>REPORTS: Run reports for a 360° view of all activity and actions within Vasion instance.</p>
<p>STORAGE: Store digital documents in Vasion Drive or integrated third-party cloud storage.</p>	<p>ADMIN: Manage security, permissions, user roles, system settings, and configure setup across the platform.</p>

See **Where can I learn more?** on page 3 for additional details on each application.



Document Capture



Automated Workflow



Electronic Signature



Content Management



Print Output

How is the Vasion platform licensed?

Vasion is licensed per named user, meaning only a set number of users can be created and access the platform with Vasion login credentials. Vasion is a core license that includes access to all its application.

What does onboarding for Vasion look like?

The onboarding process is customized per customer, depending on the configuration needs. Vasion system engineers will work with you after purchase to determine the scope of your instance, milestones to achieve, deadlines, software training, and a customer application review, all to ensure you're getting exactly what your business needs.

What native integrations does Vasion include?

Are there any custom integrations?

Vasion includes native integrations with Microsoft Dynamics and Office add-ins, Salesforce, and Blackbaud, to help streamline your business processes. Vasion Storage integrates with third-party cloud storage applications like Google Drive, Box, OneDrive, AWS S3, Amazon WorkDocs, and Wasabi, so you can keep your important documents accessible and organized.

If you are interested in any custom integrations, talk to a sales representative or your Vasion project lead.

Are eSignatures in the Vasion platform legally binding?

Yes. eSignature within Vasion is legally binding and complies with the E-SIGN Act and Uniform Electronic Transactions Act (UETA). All signers must agree and consent that they are legally bound by the document and the Vasion Consumer Disclosure before completing a signature request.

What compliance regulations does Vasion follow?

Vasion helps organizations meet their compliance regulations with robust document management and reporting capabilities. The platform supports a variety of compliance regulations:

- Code of Federal Regulations, Title 21 Part 11
- The Sarbanes-Oxley Act of 2002
- The United States Health Insurance Portability and Accountability Act (HIPAA) of 1996
- The Health Information Technology for Economic and Clinical Health Act (HITECH) of 2009
- AES (Advanced Encryption Standard) 256 File Encryption

What types of encryption does Vasion support?

The Vasion website URL uses TLS 1.3 to encrypt online communications. All data in the Vasion platform, documents, PII, form entry data, encrypted in transit by default and at rest using Advanced Encryption Standard (AES) 256-bit algorithm, according to your configuration and business needs. Also, all documents and files are stored with an encryption layer for an extra level of protection when documents are at rest in cloud storage.

What authentication methods does Vasion support?

Vasion supports SSO via Active Directory and SAML 2.0, as well as a Vasion login with a username and password. Administrators can configure password policies for Vasion logins, like a character max, password expirations, a number of uppercase letters or numbers, etc.

Can I opt for a cloud-based storage provider over Vasion Storage?

Yes, although there are some features you would sacrifice opting for only a cloud certified provider for document storage. With Vasion Storage, all files can be encrypted both in transit and at rest, configurable by an administrator. Also, Vasion manages all storage backups, and by using a third-party cloud storage, you would need to manage your own backups.

Keep in mind, you can utilize both cloud storage and Vasion Storage in your Vasion instance. Regardless of which storage providers you choose, Vasion Storage lets you securely manage all your content anytime.

What types of standard reports can I run in Vasion?

Can I configure custom reports?

Vasion users can run user, document, audit, and workflow reports for a log of the activity, either all or in a specific time range, in the platform.

Users can create custom workflow reports via our point and click report builder. All reports in a Vasion instance can be scheduled to run automatically and sent out as a CSV or PDF file, as well as configured with permissions in order to view.

Where can I learn more?

Check out our [Vasion documentation](#) to learn more about the applications and features, and how they work.

**Interested in digitally transforming your organization's
business processes using Vasion?**

Visit our [website](#) and [schedule a demo](#) today.

VASION



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