Vasion Automate Pro FAQ

OVERVIEW

Vasion Automate Pro helps enterprise IT leaders digitize advanced business operations within weeks, not months. Use Vasion's no-code platform to intelligently digitize physical documents, harness data, easily build workflows, and automate processes to drive efficiencies and lower operating costs.

What are the benefits of Vasion Automate Pro?

Vasion Automate Pro 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 Automate Pro Solution Brief for more details.

What automation tools are included?

Vasion Automate Pro includes 10 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	ADMIN
WORKSPACE: A dashboard to start, view, monitor, and complete pending workflows.	**WORKFLOWS:** Create and automate task sequences to eliminate redundant processes.
CAPTURE: Use a desktop scanner to scan paper documents directly to workflows or storage, utilizing AIP templates for zonal OCR and Textract capture.	**TEMPLATES:** Create reusable email and document templates for workflows.
FORMS: Build digital forms for a workflow with our no-code, intuitive form designer.	**AUTOMATION:** Schedule various jobs to run at specific times.
SIGNATURE: Send documents for Signatures and manage sent signature requests.	**REPORTS:** Run reports for a 360° view of all activity and actions.
STORAGE: Store digital documents in Vasion Drive or integrated third-party cloud storage.	**ADMIN:** Manage security, permissions, user roles, system settings, and configure setup across the platform.

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

How is Vasion Automate Pro licensed?

Vasion Automate Pro is licensed per named user, meaning only a set number of users can be created and access the platform with Vasion login credentials. Vasion Automate Pro is a core license that includes access to all its applications. For more details on pricing, contact your Customer Success Manager for more information.

What does onboarding for Vasion Automate Pro look like?

The onboarding process is customized per customer, depending on 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 Automate Pro include? Are there any custom integrations?

Vasion Automate Pro includes native integrations with Microsoft Dynamics and Office add-ins, Salesforce, and Blackbaud to help streamline your business processes. Vasion Automate Pro 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 Signatures in the Vasion Automate Pro platform legally binding?

Yes. Signature within Vasion is legally binding and complies with the ESIGN 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 Automate Pro follow?

Vasion Automate Pro helps organizations meet 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 Automate Pro support?

The Vasion website URL uses TLS 1.3 to encrypt online communications. All data in the Vasion Automate Pro 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 Automate Pro support?

Vasion Automate Pro supports SSO via Active Directory and SAML 2.0, as well as a Vasion Automate Pro login with a username and password. Administrators can configure password policies for Vasion Automate Pro 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 Automate Pro 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 Automate Pro 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 Automate Pro 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 Automate Pro? Can I configure custom reports?

Vasion Automate Pro 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 Automate Pro documentation to learn more, or contact your Customer Success Manager.