

Regulatory Compliant Document Generation in SharePoint & Office 365



About Gig Werks

Be it in the Cloud with Office 365 or on premise, Gig Werks has delivered award winning targeted and focused business solutions for departments and industries, built on Microsoft SharePoint.

Microsoft Awards & Recognition

- Microsoft Gold Partner since the firm's beginning in 2001
- Virtual Technology Specialists for the Microsoft New York Enterprise Group
- 5 Time Microsoft SharePoint Technical Excellence Partner Award Winner
- Approved Vendor of Microsoft Legal and Corporate Affairs Group (LCA)
- Invited into the Partner Evidence Program for SharePoint 2007, 2010, 2013 & 2016

Deep relationship with Nintex

- Nintex Partner Award Winner 2015
- Serves on the Nintex Partner Advisory Board
- Certified Nintex Technical Evangelist

Deep Industry Experience in:

- Legal, Financial Services, Architecture/Engineering/Construction, Healthcare/Pharmaceutical, Professional Services

Expertise around Full Capabilities:

- Office 365, SharePoint, Cloud Applications, Business Intelligence and Microsoft Stack



Packaged Solutions & Offerings

Packaged Solutions

Premium Advisory Services Plan – Modernize the Enterprise

Managing Your SharePoint & Cloud Services with Gig Werks

SharePoint & Office 365 Workshop

Quick Start & Training Workshop

SharePoint Business Solution Planning

Plan your SharePoint initiatives with Gig Werks

Nintex Workflow Quick Start

Nintex Installation, Configuration & Training Workshop

Compliance Approval Workflow Quick Start

Workflow Implementation & Report Generation

SharePoint Modernization Assessment

Plan to move your processes to modern applications

Why 3rd Party Applications

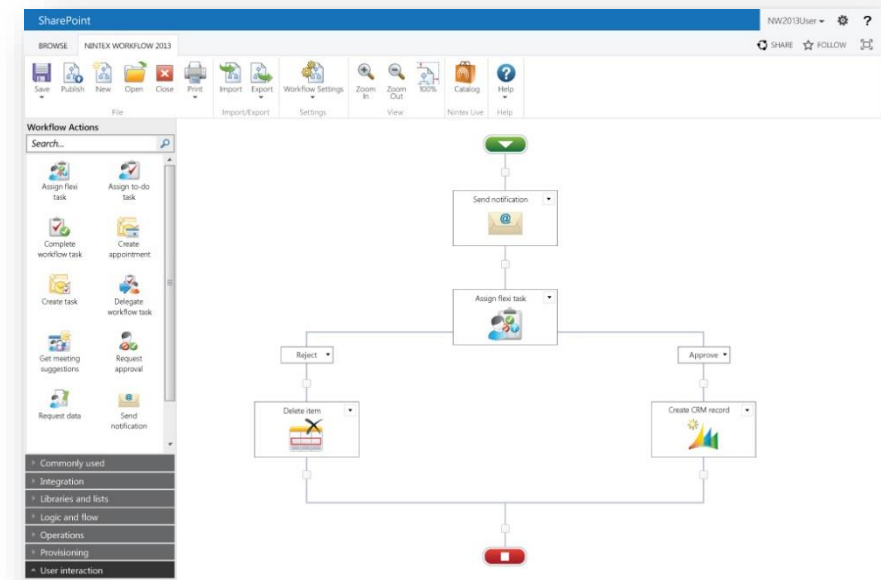
- Out of the Box feature doesn't exist
- Reduces Risk and Drives High Return on Investment
- Don't "Recreate the Wheel"
- Need for Specific Business or Industry Solution or Functionality
- Scalability and Easy Upgrade / Migration
- Speed to Market
- Satisfy Regulatory Requirements or Compliance
- Product and Solution Support

Nintex Workflow

Nintex Workflow for Office 365 and SharePoint enables organizations to extend business process automation to more people, places and devices, delivering workflow for everyone. Nintex Workflow adds a drag-and-drop workflow designer, advanced connectivity, and rich workflow features to give customers more power and flexibility.

Benefits and ROI of Nintex Include:

- Reusable templates and modules
- Share and align business practices across teams
- Reduced IT burden
- Efficiency gains and reduced processing costs
- See real-time status of workflows
- Measure and improve business performance
- Built-In ROI Calculator
- Lazy Approval



Objectives for digital transformation



- ✓ Closer to customers
- ✓ More efficient
- ✓ More agile & innovative
- ✓ More competitive
- ✓ More profitable

Value of Intelligent Compliant Document Creation

- Re-usable, Bulletproof data
- Improve accuracy & compliance by eliminating risk of errors & omissions
- Assemble data from across the enterprise intelligently from virtually any data source
- Forms driven automation of document creation in Word, PDF, PowerPoint & Excel
- Drive Significant Time Savings and Rapid Return On Investment (ROI)

NINTEX



Any Content, Any Source



Create Documents



Consistent Delivery

Value of Intelligent Compliant Document Creation

Automate the Generation Of:

Contracts	Pipeline Reviews	Financial Pitch Books	Legal Advice
Quotes	Renewals	Statements of Advice	Terms & Conditions
RFP's	Response Letters	Annual Reports	Customer Correspondences
Proposals	Work Order Summaries	Invoices	Notifications for Doctors, Pharmacists & Customers
Account Plans	NDA's	Quote metrics	Project Summaries
Inventory Reports	MSA's	Forecasts	Candidate Profiles
Activity Logs	Licensing Agreements	Business Reviews	Repair Orders
Case History	Consumption Reports	Commission Reports	



Any Content, Any Source



Create Documents

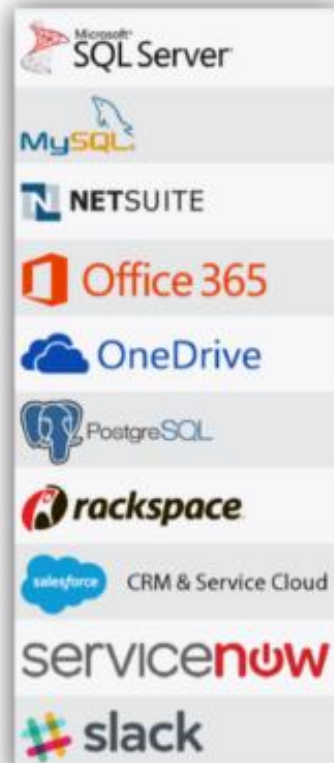
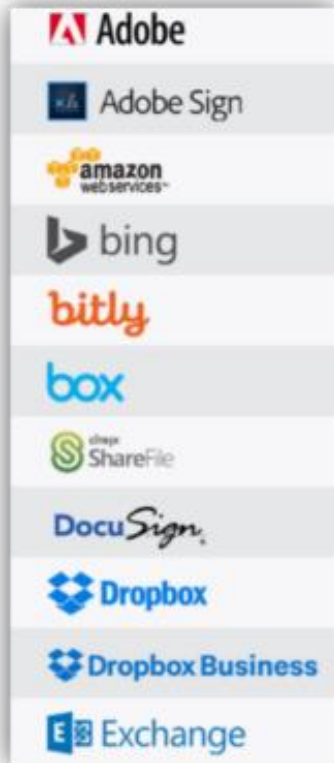


Consistent Delivery

Value of Intelligent Compliant Document Creation

Assemble Content With Pre-Built Connectors to:

NINTEX



Any Content, Any Source



Create Documents



Consistent Delivery

Demonstration: Municipal Treasuries Group

Challenge - FINRA compliance

- Group works with municipalities to sell bonds on those entities behalf
- Must maintain FINRA compliance
- Time Consuming
 - Paper intensive
- Error prone
 - Re Keying of data
- Approval Trail Required for compliance

NINTEX



Any Content, Any Source



Create Documents



Consistent Delivery

Demonstration: Municipal Treasuries Group

Solution - FINRA compliance solution with Nintex

- Wizard based approach to data collection via forms
- Integrated LOB information reducing errors and insuring consistency
- Automatic creation of documents drastically improving efficiency via Nintex Workflow and Document Generation
 - BD (Broker – Dealer)
 - G17 Regulatory satisfaction
- Audited approval chain
- Reporting

NINTEX



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Create Documents



Consistent Delivery

Intelligent Document Creation Demonstration

Neil Barkhina

Chief Technology Officer



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