Platinum Configuration Features

P E R R
K N I G H T

This configuration has been built and tested as a package. Any existing or new client may adopt this configuration in whole or in part. As current configurations vary, there may be additional consulting fees related to the implementation of this configuration for existing clients.

"Homepage" Dashboard

This page was designed to keep all the projects and filings that require action to your attention. Projects that are being prepped for filing submission and filings that are pending with open activities will populate this Homepage.

State Status Page
(State Assignment of filings)

The State Status Page was developed in order to facilitate state assignments to regulatory analysts and provide the overall status of a state when there are multiple filings.

Forms Library "State" View

This view in the Forms Library adds a state level grouping and several additional columns to the standard Forms Library view. The Forms Library search engine also includes a copy paste from Excel option when searching for multiple forms.

Single Sign on via SAML

Users do not need to enter a username and password. As long as the user is in the client network, the system will log the user in.

Data Segmentation

Ability to group users together by business unit such that each group ONLY sees their own data.

Multiple User Roles

Business Users, Managers, and Regulatory Analysts have defined roles and access levels.

Optimized Filing to Project Method

This configuration will allow users to circumvent the SERFF Intake folder in StateFilings.com.

StateFilings.com
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