The documents you need, when and where you need them.

Library from ⬡ Integrated Publishing Solutions makes it easy to find the documents you need for the products you sell, and provides a platform for automated onward distribution, with rich tagging based on product and audience.

Intelligent tagging based on product knowledge.

Library holds a flexible product model that can be customised for the product attributes that matter most to you. This enables rich tagging of all uploaded documents, without the need for document providers to manually add full sets of tags, or to have complete product knowledge (such as in which jurisdictions a product is available).

No more searching through poorly organised lists or folders.

Documents can quickly and easily be found and filtered based on their rich tagging, and are displayed in a highly organised manner - sorted and grouped by product and audience. This makes getting the documents you need a rapid, simple, and easy process.

Distribute your documents wherever they are needed.

A rich API allows external services to access Library documents, whilst our internal team of developers have experience setting up automated distribution to 3rd parties such as Morningstar and fundinfo, email lists, and other destinations. The custom nature of the "push" distribution allows us to ensure the right meta-data is added for your documents and the target channel, all based on your product model.

We're here to help.

A highly organised document library allows you to find the documents you need and enables onward distribution. We believe getting this right is down to a combination of technology and process. We don't provide the software then abandon you. Our experienced teams work closely to help you get your documents organised, and your tagging correct and consistent, to enable you to get the most out of Library.

Tried, tested, and trusted.

Library is used in production by a top 10 asset manager to allow their sales and marketing teams across the globe to quickly and easily access the documents they need, as well as supplying these documents to their websites, 3rd party apps, and various distribution channels. Used regularly by 150+ users to access a total of over 16K documents with almost 850K unique document references.

Tag documents based on the document, Library does the rest.

If a document relates to a given fund range, region, investment type, or fund manager, then tag it against that. Library will then create unique "document references" for each relevant combination of product and audience, based on the document tagging and product model (including which products are available in which jurisdictions).

Product updates are reflected automatically in document tagging.

Launching, discontinuing or renaming a product? Releasing an existing product in a new jurisdiction? Changing product attributes (such as manager or category)? Library takes care of re-tagging existing documents, so you don't have to.

Your favourites, even faster.

Saved Searches and Folders allow you to get to your most frequently accessed documents even faster. Saved Searches allow you to easily repeat your most commonly performed searches, whilst folders store links to document references, meaning they always contain the most recent versions of a given document for a specific product and audience.

Control access and limit results with user profiles.

User profiles allow a set of filters to be added to all searches that a user performs. This allows groups of users to be restricted to viewing subsets of documents based on their tagging. This can be used to prevent users from accessing documents they shouldn't, and for reducing result sets, so that users aren't overwhelmed by irrelevant results. Each user can be assigned multiple profiles, allowing them to quickly switch between views for different audiences (such as different jurisdictions and client types).

Need to give external users access to your documents? We can help.

Whilst Library is focused on internal users and onward distribution, if you want to make use of Library's rich tagging and search capabilities for your external facing services, then we can work with you to suggest the best strategies to achieve this, and can help make it happen.

Securely hosted in the cloud.

Cloud hosting with a UK based ISO 27001 managed provider means that the latest documents are always available to you, whenever and wherever you have an internet connection, and gives you the confidence you need in the security of the hosting environment.

To find out more, please contact us:

📞 +44 (0)1926 889 199 • ✉ enquiries@integrate.co.uk • 🔗 integrate.co.uk