

## Product

- ▶ DocStar® ECM Forms

## Benefits

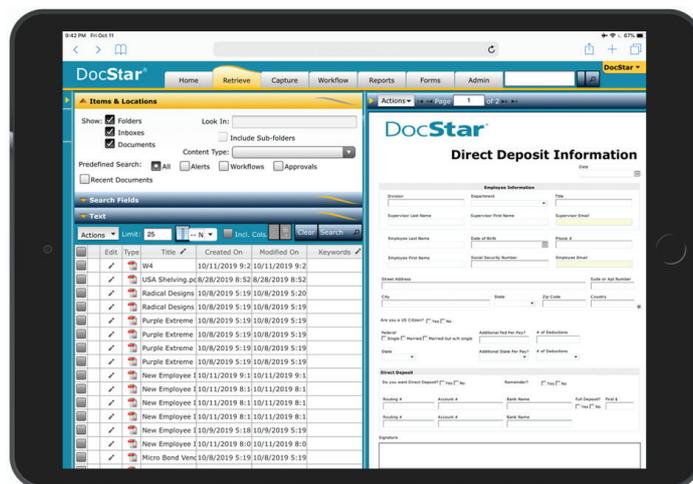
- ▶ Easy to use drag-and-drop forms builder
- ▶ Auto-populate data from other systems
- ▶ Permission-based security
- ▶ Automated e-mail alerts for form status
- ▶ Workflow triggers automated processes
- ▶ Send forms to external users for completion
- ▶ Integration with any ERP and CRM system
- ▶ Ability to apply JavaScript to perform complex calculations
- ▶ Group related forms for guided, efficient entry

## Any Form, Anywhere, Any Time

Goodbye paper forms. Hello smart workflow. Paper forms that are scanned or re-keyed into your database cause loss of data, efficiency, and profitability. Fillable PDFs help bridge the gap between paper and true e-forms, but without real-time workflow integration, you're missing out on a truly paperless process. With DocStar ECM Forms, easily create custom forms with drag-and-drop technology—no need for IT, complex coding or expensive third-party resources. Your teams can access DocStar ECM Forms on any device, and integration with your existing line of business software allows for automated notifications of workflow assignment to ensure faster, more efficient processing across every department.

## Easy to use, secure forms processing

Once your form has been published, it can be updated and edited (with the proper permissions) and data can be imported from other line of business systems and then routed to the right person, at the right time, eliminating mistakes, ensuring completeness of information and reducing operational costs.



Web-browser interface enables form design and entry on your choice of devices.

DocStar ECM Forms offers substantial benefits across your organization and a fast return on investment. After implementation, you will increase data and workflow visibility, shorten cycle times, improve service and eliminate paper and paper-related expenses.

- ▶ Eliminate paper at its source
- ▶ Remove the cost of printing, storing, and distributing pre-printed forms—and the waste of obsolete forms
- ▶ Complete forms faster and easier with automatic formatting, calculations and data validation
- ▶ Shorten approval cycle times with workflow routing via e-mail
- ▶ Integrate data with core business systems to eliminate data entry errors and improve productivity

## Do Much More Than Just Fill in the Blanks

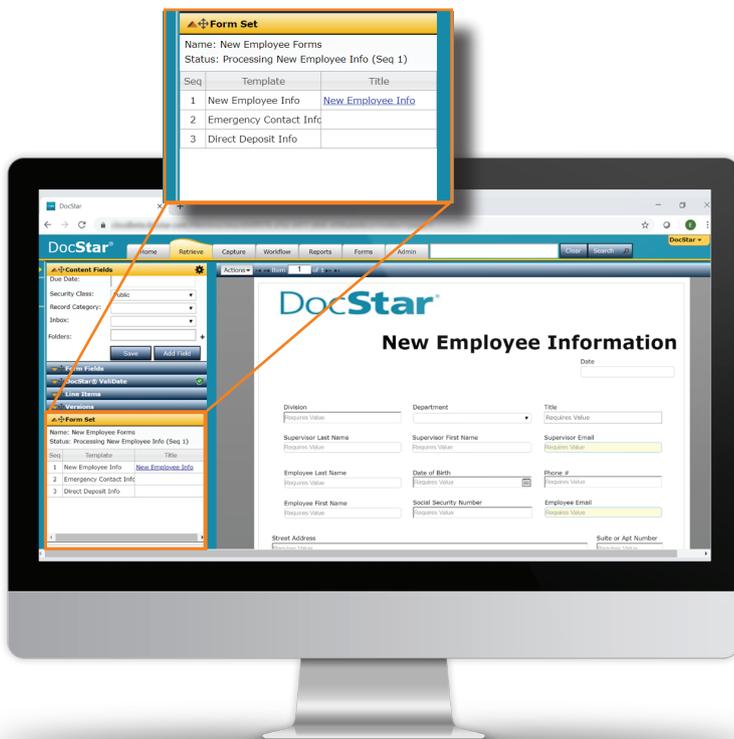
Field Validation features enforce required field entries and more. You can enter conditions to be evaluated, like summing line item prices and displaying a total, or true/false conditions that require additional detail filled in when a box is checked. It has conditions you can set up to control the appearance or behavior of fields based on the contents of other fields. As an example, let's say an employee is filling in a computer hardware/software request form from their IT department and chooses "Hardware." A dropdown menu can display a static list of IT-approved hardware choices, or it could even be a live lookup list to ERP or another data source.

## Keep It Organized

You can build Form Sets, a group of forms that can be filled in together for rapid entry; for example, onboarding documents for Human Resources such as new employee info, emergency contact info, direct deposit info, and the like. You can set the sequence in which the forms appear and create conditions to decide which form should be presented next; for example, if a new hire declined insurance coverage, don't present forms related to insurance. Fields can be synchronized across forms so that, for example, the person filling in the form only needs to enter their phone number once and it will appear on all the forms.

## Sign on the Dotted Line

After the form or form set has been filled in and the user clicks the Submit button, the form can be programmed to present a signature box that the user can fill in with mouse or other input device. Their signature is then stored on the form. This particular Form Signatures feature serves the purpose of acknowledging receipt and form completion. For increased signature security and validation, an optional DocStar ECM Connector for DocuSign® eSignature is available, which works within DocStar ECM Forms. eSignature uses Public Key Infrastructure (PKI) to provide the highest levels of security and universal acceptance and allow multiple parties including external non-DocStar ECM users to participate in a signing ceremony.



*Form Sets provide guided entry through a collection of related forms.*

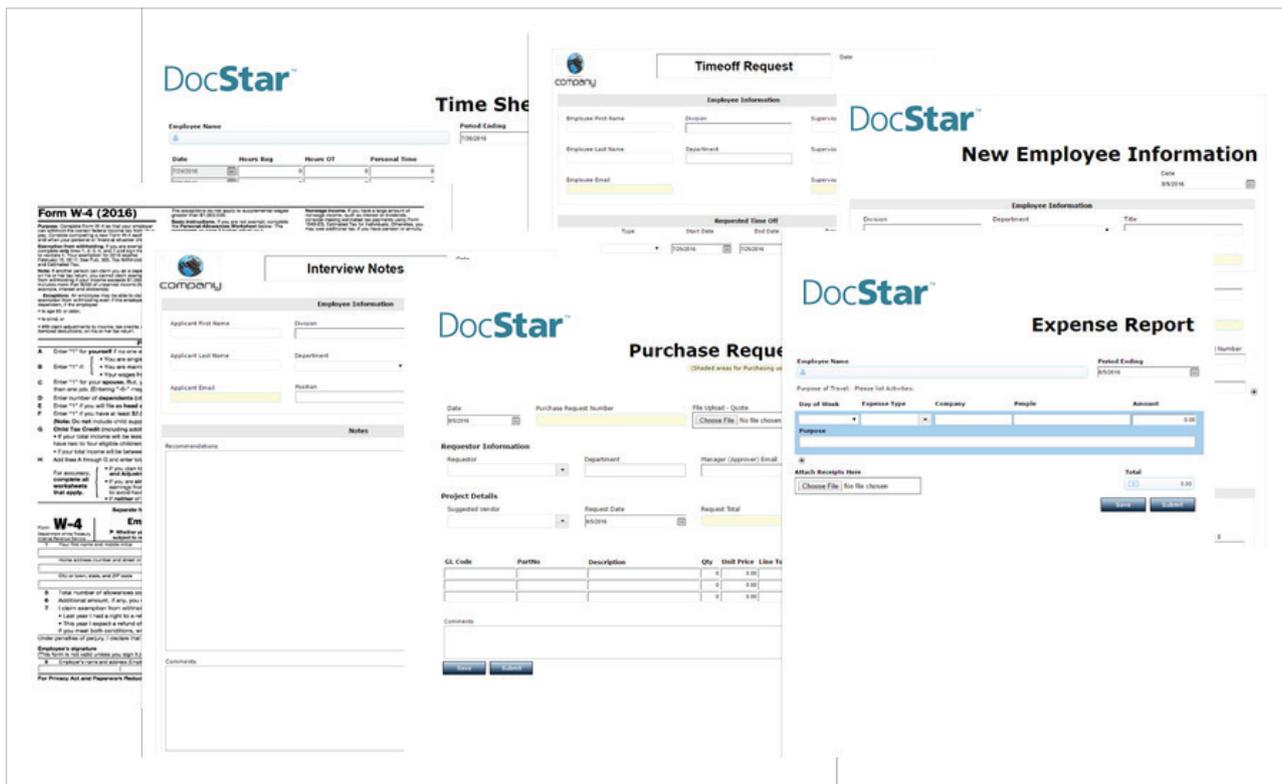
## Sample forms included

- ▶ Sample forms included
- ▶ Purchase request
- ▶ Time-off request
- ▶ Expense report
- ▶ Time sheet
- ▶ Interview notes
- ▶ New employee info
- ▶ W4

## Requirements

Form Sets, Form Signatures, and Field Validation are features available in Forms 2.0 and higher, which requires DocStar ECM Version 19.1 or higher.

DocuSign eSignature capability in DocStar ECM requires the purchase of a license or subscription for DocStar ECM DocuSign Connector. DocStar ECM Version 18.2 or higher is also required.



An assortment of form template examples is provided.

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