DocStar®

IGNITING DIGITAL TRANSFORMATION

Enterprise Content Management (ECM)

BENEFITS

- Cloud-based, high speed access from any device
- Leverages smartphones and tablets
- Helps to quickly streamline document processes and reduces errors
- Minimizes business risk associated with lost files
- Elegant, intuitive design helps reduce learning curve
- Files can be easily and securely shared with others
- Enforces document integrity and eSignature validation

Cloud and On-Premises Enterprise Content Management

DocStar (ECM) is a fully digitized repository with business automation that eliminates the waste and double handling associated with paper, poorly maintained online folders, and never-ending email threads. DocStar empowers your team to capture, store and manage any document or file, from any location, on any device. Powerful integrations with virtually any ERP, accounting, or other business application give you an even better return on investment. Deeper business insight empowers you to make smart decisions that positively impact your bottom line.

Customers can install the solution on their on-premises hardware or use DocStar SaaS or hosted service. The same software, the same user experience, the same great results. DocStar supports all popular browsers and mobile devices delivering access anytime, anywhere.

Content Protection

Security

Granular permission settings in documents, inboxes, folders, workflows, and retention policies meet or exceed compliance requirements.

- Organize all enterprise information in a secure, central repository
- Utilize audit trails to meet compliance requirements
- Protect your data with secure encryption
- Experience single sign-on through active directory/LDAP integration

Audit Trail

With Audit Trail, you'll be able to instantly know every time someone has viewed or changed any document. You'll know who performed the action, when it was done and what was done—instantaneously—reducing your exposure to risk and giving your business or organization the tools to help you operate more efficiently and profitably.

Data Center

DocStar software uses a secure, state-of-the-art Data Center with Amazon Web Services® (AWS) that utilizes best practices for backup, maintenance and upgrades helps ensure maximum performance and availability of your business critical documents.

DocStar ValiDate

A unique feature in the core DocStar product, ValiDate verifies document integrity for all new documents added to the repository. When a document is added, an encrypted hashcode is generated, like a "digital fingerprint" stamped with the contents and date and time of entry into the system. ValiDate helps ensure documents are tamper-proof and valid by evaluating and displaying a green or red stamp each time the document is viewed.

Cloud

Deployment Options

Cloud or on-premises/private cloud—any way you slice it—the same software, the same user experience, the same great results.

Business Continuity

Safeguard your data with secure, redundant backups so you can be ready for anything.

Ease of Use = Speed to ROI

Built for speed and usability, DocStar provides an exceptional user experience—often with little to no training required.

Mobile Access

- Instantly access key information
- Participate in content workflows
- Extend collaboration to users on-the-go

Collaboration

Email

Files can be easily and securely shared with others.

Version Control

- Track document versions through multiple revisions
- Check-in and check-out
- Work collaboratively with multiple editors
- Audit trail for all revisions—editors, order of changes and record of saved versions
- Assign user access and document "states" for secure editing
- Store unlimited number of revisions
- Latest version clearly identifiable
- Historical record of changes made with comments

Process Improvement

DocStar (ECM) Workflow

- Easily create and edit content-driven workflows using an intuitive graphical canvas
- Create custom rules to process and route content for approval
- Distribute items automatically based on business conditions
- Receive real-time notification of workflow alerts and information
- Monitor progress through the workflow dashboard
- Complement existing business applications for approval business conditions and information and technologies

DocStar Intelligent Data Capture (IDC)

Using artificial intelligence, including patented unassisted and assisted machine learning algorithms, DocStar IDC helps reduce the manual identification and sorting of incoming documents along with the manual data entry of key data elements from those documents.

- Capture documents from virtually any input device in any location and store them in a central location
- Easily import/save documents from applications and file systems
- Automated indexing—advanced OCR, barcodes, Regex pattern matching, formatting
- Embedded browser-based scanning

DocStar (ECM) Connector for DocuSign® eSignature

The DocStar Connector uses embedded electronic signature capability using the DocuSign eSignature API. Access DocuSign from within DocStar ad hoc actions and workflow tasks to complete approvals in minutes—not days —by securely accessing and signing documents from virtually anywhere in the world. External, non-ECM users can also be engaged by DocuSign into a signing ceremony.

DocStar (ECM) Forms

Easily create electronic input custom forms with drag and drop technology.

- Easy to use drag and drop forms builder
- Auto-populate data from other systems
- Permission-based security X Automated email alerts for forms status
- Form Sets with guided, rapid entry in groups of related forms
- Uncluttered views, with attachments neatly arranged in expandable ribbon bars
- Field Validations including conditions setup
- Embedded Forms Signatures or use DocuSign eSignature

Search and Retrieve

Retrieval has never been easier with powerful context searching.

- Automatically perform commonly used searches (text, field, annotation and name) from a Googlestyle toolbar
- Use simplified auto-complete or structured boolean search
- Search the contents of the entire repository in seconds
- Using "Fuzzy" searches easily locate documents that sound similar

Document Retention

Easily apply and automatically enforce document retention policies.

- Set document disposition to auto-destroy or place in review folder
- Easily and instantly apply document freezes when necessary
- Save time while easily complying with legal or organizational retention requirements

DocStar (ECM) PackageWorks

Today's organizations create document packages every day—packages such as:

- Onboarding packages for new employees in HR
- Student records in educational institutions
- Closing documents for real estate transactions
- Document packages required for legal or accounting clients

These packages need to be complete, accurate, and delivered on time.

DocStar (ECM) PackageWorks delivers streamlined, intelligent, electronic package-based workflows to improve collaboration and ensure consistent, complete document packages.

Connectors and Integrations

ERP-agnostic with virtually unlimited integrations.

Common integrations include:

- Epicor® BisTrack™
- Epicor Kinetic
- Epicor® Prophet 21®
- Epicor® Vision®
- Dassault Systèmes DELMIAWorks® (formerly IQMS™)
- Infor® SyteLine®

- Karmak Fusion™
- Microsoft® Dynamics® GP
- Microsoft® Dynamics® BC
- Microsoft® Dynamics® 365
- Microsoft Office®
- Sage® 100 and 300
- UKG® Pro™ (formerly UltiPro)

Purchase Order Acknowledgements Module

Use this deeply integrated, packaged workflow to mark PO records as "Acknowledged" in your ERP system based on incoming responses from your vendors. Available for selected ERP systems.

AP Automation Module

Use this deeply integrated, packaged workflow to automate processes and approvals for incoming accounts payable invoices into your ERP system from any source. Available for selected ERP systems.

Sales Order Automation (SOA) Module

Use this deeply integrated, packaged workflow to automate processes and approvals for incoming purchase orders—from any source— into sales orders in your ERP system. Available for selected ERP systems.

DocStar (ECM) Mobile App

Available for iOS™ and Android™, the DocStar Mobile App provides many features that approach the functionality of the full desktop browser client. Mobile App features for users on-the-go keep workflows and approvals moving forward for continuous business operations.

Capture

Snap a photo of a document or image with your mobile device or import from your photo library or file folder. It's a convenient way to load documents into DocStar.
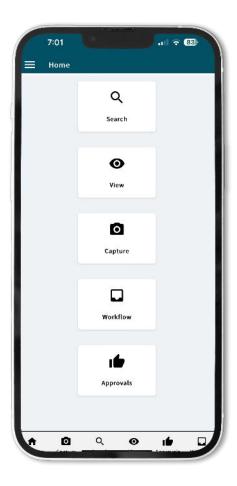
Search

Search any metadata content field or content type or set up complex search fields such as "Title Contains AP" AND "Created Before 8/25/2021." Save your searches for next time.

Retrieve

Add unlimited field columns to your retrieved lists of documents. The grid scrolls horizontally too and adapts to any size device, landscape or portrait. Select one or more documents for such actions as View, Email, Request Approval, Workflow Actions, and more.

View

View the document on the same screen as its menus for Approvals, Content Fields, History, and Workflow. Pinch zoom in and out and rotate the document. Assign a content type to the document and fill in the appropriate metadata content fields for that document. Assign a workflow and approve.

Workflow

Filter the list of workflow documents by workflow type or workflow queue. Perform workflow actions such as Assign Workflow, Restart Workflow, Terminate Workflow, and more.

Industries

DocStar can provide a high return on investment across every industry and every department. Use cases include but are not limited to:

- Accounts payable
- Human resources
- Sales
- Operations
- Healthcare
- Government

- Manufacturing
- Distribution
- Financial
- Services
- Education

Solution Languages

DocStar software is available in U.S. English, Canadian French, Simplified Chinese, Spanish for Latin American and Caribbean (LAC) countries, Finnish (Suomi), Swedish (Svenska), Vietnamese, and Dutch (Netherlands). Language is a user preference, so that each user can choose their preferred language from a drop-down menu on their main ECM screen.

Support Community

- Customer support team call, portal, chat, help knowledgebase, training
- Customer betterizers, customer satisfaction, training webinars, in-solution and training tips
- Professional services
- Softcare, DocStar (ECM) software maintenance support

DocStar®

1-888-752-7877

www.docstar.com | docstar@docstar.com