DocStar Enterprise Content Management

EPICOR

Product
▶ Epicor® Prophet 21®
▶ Epicor® ERP

Benefits
▶ Cloud-based, high speed access from any device
▶ Leverage smart phones and tablets
▶ Quickly streamlines document processes and reduces errors
▶ Elegant, intuitive design reduces learning curve
▶ Minimize business risk associated with lost files
▶ Files can be easily and securely shared with others
▶ Document integrity and eSignature validation is enforced

Cloud and On-Premises Enterprise Content Management

DocStar ECM is a revolutionary product that's built for the web and delivers deployment choice. 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 ECM supports all popular browsers and mobile devices delivering access anytime, anywhere.
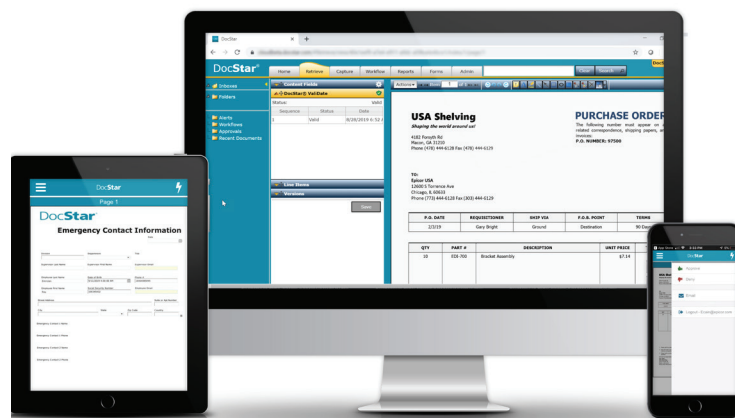
When deployed as a SaaS or hosted service, customers can enjoy the benefits of very low overhead and minimal startup investment, easy access via a Web browser and the security of a redundant, disaster-proof data center. There is no specialized hardware to manage and there is no up-front capital investment. Although designed using robust enterprise architecture, DocStar ECM is flexible and affordable to meet the needs of a small office or enterprise environments.

Content Protection

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

▶ Grant access to documents based on user permissions
▶ 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

Access DocStar ECM via web browser or iOS and Android device apps

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 operate more efficiently and profitably.

Data center

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

DocStar ECM ValiDate

A unique feature in the core DocStar ECM 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 ensures 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 ECM 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

E-mail

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 and technologies

DocStar Intelligent Data Capture (IDC)

Capture documents from virtually any input device in any location.

- ▶ Centralized storage accessible from widely distributed locations
- ▶ Easily import/save documents from applications and file systems
- ▶ Automated indexing—advanced OCR, barcodes, Regex pattern matching, formatting
- ▶ Embedded browser-based scanning
- ▶ Smart text extraction and evaluation of data from content

DocStar ECM Connector for DocuSign® eSignature

The DocStar ECM Connector uses embedded electronic signature capability using the DocuSign eSignature API. Access DocuSign from within DocStar ECM 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-DocStar 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
- ▶ Automated e-mail 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 Google-style 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

Connectors and Integrations

ERP-agnostic with virtually unlimited integrations. Common integrations include:

▶ Microsoft® Dynamics®
▶ Sage® ERP
▶ Epicor® ERP 10
▶ Epicor Prophet 21®
▶ SAP®
▶ Oracle®
▶ Esri ArcGis
▶ Salesforce®

AP Automation Module for Epicor ERP 10 and Prophet 21

Use this deeply integrated, packaged workflow to automate processes and approvals for incoming accounts payable invoices into Epicor ERP or Prophet 21 from any source.

Sales Order Automation (SOA) Module for Epicor ERP 10

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

Solution Options

DocStar ECM provides 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
▶ Manufacturing
▶ Distribution
▶ Financial Services
▶ Education

Solution Languages

DocStar ECM is available in U.S. English and Spanish language for Latin American and Caribbean (LAC) countries. 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 maintenance support

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software designed to fit the precise needs of our manufacturing, distribution, retail, and service industry customers. More than 45 years of experience with our customers' unique business processes and operational requirements are built into every solution—in the cloud or on premises. With this deep understanding of your industry, Epicor solutions dramatically improve performance and profitability while easing complexity so you can focus on growth. For more information, connect with Epicor or visit www.epicor.com.

EPICOR.

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