


document management.  
**Easy. Fast. Smart.**

# docSTAR™ Business Document Packages.



Streamline operations to improve quality, accountability, and productivity.

docSTAR's **Business Document Packages (BDP)** delivers streamlined, intelligent package-based workflows to dramatically increase productivity and ensure that the final package is consistent and complete.

Today's organizations are creating business document packages everyday. Examples include: HR packages for employees, student records, closing documents for Real Estate and packages required for legal or accounting clients. These packages need to be complete, accurate and delivered on time!

**With docSTAR's BDP:**

- ★ Eliminate tedious manual processes.
- ★ Support compliance initiatives.
- ★ Automated e-mail alerts improve efficiency.
- ★ Increase employee productivity and customer satisfaction.
- ★ Better manage approval processes.
- ★ Reduce confusion and errors.

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**Work Smarter.**

docSTAR Business Document Packages allows your important business documents to be routed electronically, enabling users to process work more efficiently, faster, and more accurately.

docSTAR BDP is essentially a document checklist designed to gather and track a set of documents necessary to complete a business workflow.

**With docSTAR BDP:**

- ★ Create unlimited sets of document package requirements that pre-define and guide the collection and completion of document workflows or business needs.
- ★ Built-in alerts and approval capabilities help organizations create and maintain a consistent, managed process.
- ★ Direct items to the right users, ensuring timely action and eliminating confusion.
- ★ Streamline case/transaction management to accomplish more business, more accurately.

**Reduce Tedious Steps.**

Automate time-consuming and error-prone manual processes to increase productivity and operational efficiency; delivering a significant increase in workplace productivity.

- ★ Streamline people-based activities and track their progress.
- ★ Standardize manual processes, such as the distribution of inter-office mail.

**Stay Informed.**

With docSTAR BDP... you will know how processes are performing. Managers can identify any lags and workflow bottlenecks that occur to redistribute workloads to other users before problems flare up.

- ★ Easily maintain performance comparisons.
- ★ Track document-related activity to improve quality and user productivity.
- ★ Gain accurate and timely system feedback for reallocating staffing resources.
- ★ Find the status of any document package instantly.

**Higher Productivity - Higher Profits.**

You can better manage the routine work processes with docSTAR's Business Document Packages module to achieve a competitive edge.

- ★ Reduce time and costs by dramatically speeding up processes - avoid "dead time" between process steps.
- ★ Lower overhead costs.
- ★ Improve customer service effectiveness.
- ★ Make more-informed decisions.

**Meet Compliance Goals.**

Regulatory mandates and reporting requirements from Sarbanes-Oxley, HIPAA, and others have strict rules on how companies process, track, disclose, and distribute information. docSTAR's document management solution with BDP help to enforce accountability and support compliance by standardizing and tracking business processes. You will know who, where, and when information and tasks were acted upon.

- ★ Creates an audit trail so that you can demonstrate compliance.
- ★ Set and enforce security levels to maintain proper access and also support compliance.

**The BDP Work Process**

Authorized users define which documents are required for each work process or **Package Type**. Users create a **Work Package** and add documents to it, filling document "slots". E-mail alerts inform users when a package changes status or is overdue to help keep work processes moving along smoothly.

**BDP Package Types**

| Seq#... | Name                     | Description            | Mandat... | Approval | Processing Time |
|---------|--------------------------|------------------------|-----------|----------|-----------------|
| 0001    | Loan Application         | Loan application fo... | Yes       | 0        | 3 Days          |
| 0002    | Income Verification-Pay  | Pay stubs for part...  | Yes       | 0        | 3 Days          |
| 0003    | Income Verification-W2s  | W2 Forms for last...   | Yes       | 0        | 3 Days          |
| 0004    | Employment Information   | Name & address of...   | Yes       | 0        | 3 Days          |
| 0005    | Bank Statements          | Bank statements f...   | Yes       | 0        | 3 Days          |
| 0006    | Investment Acct State... | Investment accou...    | Yes       | 0        | 3 Days          |
| 0007    | Driver's License         | Driver's License Ph... | Yes       | 0        | 3 Days          |

**Package Types** are templates for each business process - defining the general rules for each package. This view shows "slots" for each expected or required document and other rules governing work packages of this type.

**BDP Work Packages**

**Work Packages** are specific occurrences of each Package Type. This view shows the approval, status, and details of each slot: which slots are filled and which are not.