

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

## docSTAR™ PackageWorks.



### Streamline operations to improve quality, accountability, and productivity.

docSTAR's **PackageWorks** 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 PackageWorks 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 PackageWorks:

- ★ 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 PackageWorks allows your important business documents to be routed electronically, enabling users to process work more efficiently, faster, and more accurately.

docSTAR PackageWorks builds a document checklist designed to gather and track a set of documents necessary to complete a business workflow.

**With docSTAR PackageWorks:**

- ★ Create unlimited sets of document package requirements that pre-define and guide the collection and completion of document workflows.
- ★ Built-in alerts and approval capabilities help organizations create and maintain consistent, managed processes.
- ★ 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 progress.
- ★ Standardize manual processes, such as the distribution of inter-office mail.

**Managed Workflows.**

With PackageWorks... 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 PackageWorks 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 PackageWorks 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 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.

**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 part...	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.

**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.

Name	Document Title	Approval...	Date Due
Home Loan	Home Loan		5/17/2009
Loan Application	Loan App	Approved	5/17/2009
Income Verification-Pay stubs		(Required)	5/17/2009
Income Verification-W2s		(Required)	5/17/2009
Employment Information		(Required)	5/17/2009
Bank Statements		(Required)	5/17/2009
Investment Acct Statements		(Required)	5/17/2009
Driver's License	Driver's License	Approved	5/17/2009
Credit Reports		(Required)	5/19/2009
Good Faith Estimate	good_faith_estimate	(Required)	5/19/2009