



Product

DocStar® ECM

Benefits

- ▶ Sign documents from anywhere on any device
- ▶ Email documents for instant signature and return
- ▶ Ensure documents are secure with encryption and complete audit trail

Sign. Send. Success.

DocStar Enterprise Content Management (ECM) offers an embedded electronic signature capability developed using the DocuSign® eSignature API. You can access DocuSign from within DocStar ECM workflow tasks and ad hoc actions for all DocStar ECM document content, forms, and packages. Complete approvals and agreements in minutes—not days—from virtually anywhere in the world. Quickly and securely access and sign documents. Easily upload and send documents for others to sign. Send reminders and check signing status any time.

The combination of DocStar ECM plus DocuSign eSignature constitutes a comprehensive contract management system and facilitates end-to-end business workflows where content validation with eSignature is required for documents, forms, and packages. In DocStar ECM, DocuSign maintains a complete, automated history of every viewing, printing, sending, signing, or declining activity on a document. Once a document is signed, the certificate of completion is attached in DocStar ECM as proof of the signing process to all parties of the transaction. With DocuSign, you can be confident that your technology satisfies current regulations and statutes, such as the Uniform Electronic Transactions Act (UETA), the U.S. Federal ESIGN Act, and E.U. Directive 1999/93/EC, among others.

How It Works

Send

Easily select and send DocStar ECM documents for electronic signature.

Step 1—Select your document

Simply upload a Microsoft® Word, PDF, or other common document format from DocStar ECM.

Step 2—Indicate who needs to sign

As part of the DocStar signing workflow, add the names and email addresses of your signers and other recipients.

Step 3—Send

Predefined DocuSign fields indicate where you need a signature, initial, or date. You can also specify the order in which signers should sign and add standard or custom fields for signers to fill in. Once the document has been signed, it's automatically stored securely in DocStar ECM for easy retrieval.

Sign

Quickly access and sign documents that require your signature.

Step 1—Click the link in the email

With one click, you can access and sign the document on virtually any Internet-enabled device.

Step 2—Follow the DocuSign tabs

Tabs and simple instructions guide you through the signing process. Your electronic signatures are secure, legally binding, and widely accepted for business transactions around the world.

Step 3—Finish

Once you're done signing, click Finish to complete the process.

Manage

Readily check a document's status, send reminders, view audit trails, and securely store online.

Step 1—View your document's status

Just pull up your DocuSign dashboard to check status and schedule, run reports, and view audit trails. You can see where your document is in the signing process, set automatic reminders, and receive notifications every step of the way.

Step 2—Save automatically and securely

Once completed, both senders and signers have anytime,

anywhere access to the document. It is stored online and can be downloaded and printed as needed.

Step 3—Administer with ease

You can manage internal users, adjust branding, and get visibility into documents across your organization. Advanced options help you adhere to and set compliance policies, as well as access advanced reporting.

Typical Use Cases

Contract management

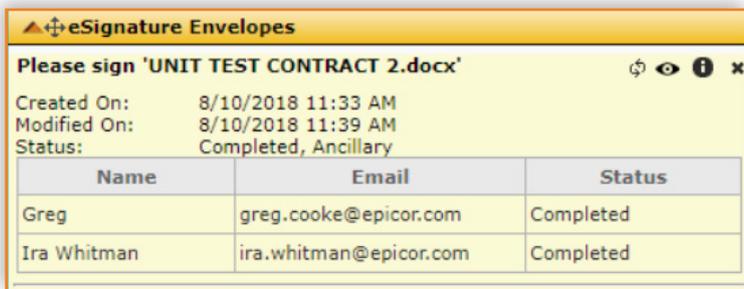
Use when your contract requires signature and countersignature. Electronic signature capabilities have revolutionized how business gets done.

Human resources

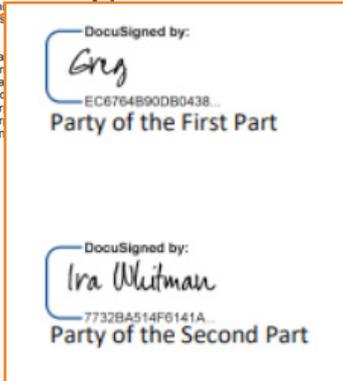
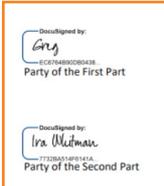
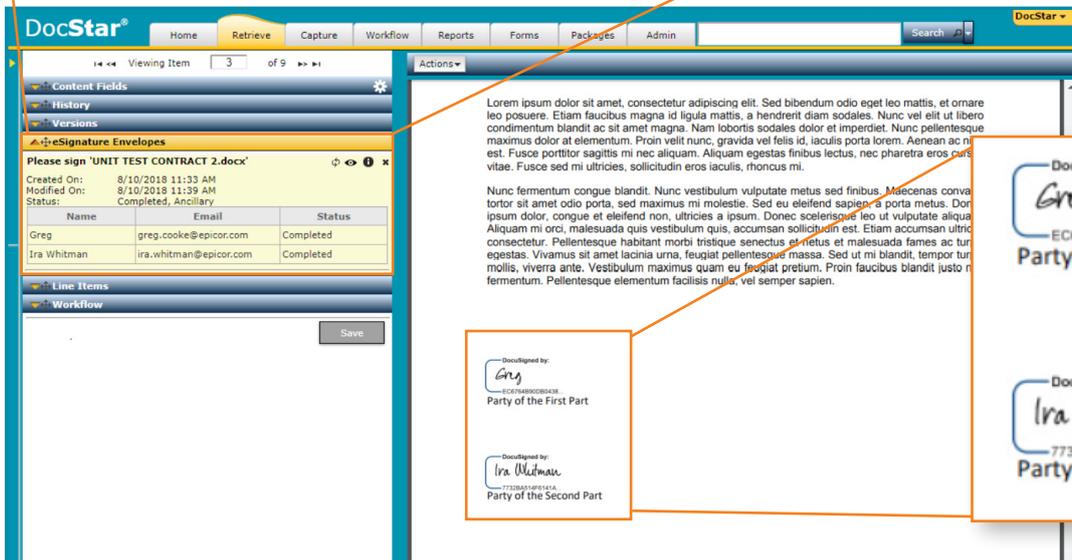
Use when a new employee application form requires a signature on some or all documents within the package or when you require a signature on the package to approve/validate the whole package.

Engineering

Use when drawing changes require a review cycle and sign-off by stakeholders—including customers.



Initiate and track document signing status within DocStar ECM.



Production testing and quality management

Use when production plans and production test results require sign-off by quality personnel.

Field service

Use electronic signatures to sign off on work orders or acknowledge goods received at an offsite location. Also use when received orders require sign-off by quality personnel.

Medical

Use for sign-off on medical forms, granting permission, or proof of acceptance.

Construction

Use for sign-off on permits, change orders, building code approvals, expenses, and more.

Property Management

Use for sign-off on inspection approvals.

- ▶ DocStar ECM envelopes track the signing status of one or more related documents
- ▶ Recipient types include signer, cc/carbon copy, must read, editor, and more
- ▶ Signature blocks, initial blocks, and metadata blocks such as PO numbers can be placed anywhere on the document

Requirements

DocuSign eSignature capability is an add-on module available with DocStar ECM Versions 18.2 and higher. You will be required to set up an account at www.docusign.com/products/electronic-signature. While DocuSign is free to users signing documents, a DocuSign subscription plan is required for integration with DocStar and requesting signatures. Premium subscriptions also allow for custom branding, signer authentication, and more.

Key Features

- ▶ DocuSign eSignature is accessible and tracked within DocStar ECM
- ▶ DocuSign eSignature is a web-based service
- ▶ Supported document types for eSignature include Microsoft Word, PDF, HTML, and other common formats

About DocStar

Founded in 1996, DocStar is an award-winning developer of document management software, enterprise content management, and automated accounts payable solutions. Available in the cloud or on premises, DocStar empowers organizations to gain control over documents, improve records retention, and increase operational efficiency to support business growth. More than 8,000 organizations in North America trust DocStar to increase productivity and automate processes to reduce transaction cycle times.



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