

DATA SHEET

Intelligent Forms Automation with OpenText LiquidOffice

Automate omnichannel capture and processing using paper, PDF forms and electronic forms to ensure accuracy and drive interaction with customers and employees



Automates
information
collection



Simplifies
creation and
publishing of
eForms



**Speeds review,
approval and
delivery of
products and
services**

Every day, customers and employees enter information on forms. No matter how they are created, distributed and captured—on paper, in electronic documents, by email, fax or using electronic forms—it is critical the information is processed correctly and in a timely manner. Capturing and processing information accurately and efficiently can impact an organization's bottom line and provide a competitive advantage.

Intelligent Forms Automation with OpenText™ LiquidOffice™ is a comprehensive, enterprise-level solution that enables organizations to seamlessly automate information capture and processing using electronic forms to drive interaction with customers and employees, ensure information accuracy and route information immediately to its destination.

LiquidOffice enables web and PDF forms creation and efficient processing of the collected information. Users can:

- Easily create intelligent forms to collect information from employees and customers.
- Leverage powerful routing and form processing capabilities to ensure information is validated, supplement information with data from other systems, route information for review and approval and save information to back-end databases and applications.
- Automate forms-driven business processes for efficiency, in order to ensure that best practices are followed and improve customer satisfaction.

LiquidOffice is available in two deployment options

1. Workgroup Server

The Workgroup includes workflow process for routing and approval activities and eForm server software, allowing for up to 100 LiquidOffice users to participate in the workflows. Clustering is not allowed. In addition, the following users must be purchased together: user licenses, process studio user license(s) and form designer user(s).

2. Enterprise Server

The Enterprise version includes workflow process for routing and approval activities and eForm server software, for organizations with more than 100 LiquidOffice users. The Enterprise version allows for server clustering, each server requiring its own server license. In addition, the following users must be purchased together: user licenses, process studio user license(s) and form designer user(s).

Users can deploy LiquidOffice as an integrated solution set with with OpenText customer experience management (CEM) solutions, such as OpenText™ Exstream™ OpenText™ TeamSite™, to manage processes from end to end. Fully functional client onboarding applications can be built using the full CEM stack to deliver an enhanced and modern customer experience. Intelligent Forms Automation provides a unified processing platform, which can process customer data that is interchanged across multiple CEM systems or platforms.

LiquidOffice features

Feature name	Description
Integrated solutions	Manages processes from end to end through integration with OpenText® Exstream®, OpenText® TeamSite®, OpenText® Content Server and content management systems
Electronic form design	Quickly design intelligent web and PDF forms to collect information and documents for routing to people and systems and integrate into business processes.
Traditional form access	Support for traditional form solutions, enabling organizations to provide easy access to standalone forms and other documents.
Web form solutions with TeamSite	TeamSite can create HTML forms that are published to a website to collect information from customers. These forms are submitted to LiquidOffice for processing (i.e. route, export and initiate workflows
PDF form solutions with Exstream	Integrates with Exstream to create and distribute PDF forms to collect customer information by email Extracts information from returned email PDF attachments and processes it
Standalone document and flattened PDF forms	Supports standalone, flattened PDF forms that can be accessed, downloaded and shared from the LiquidOffice portal. These PDF forms can be opened by any PDF viewer and web browser to ensure consistent appearance and printing.
Convert a PDF form to a web form	Imports existing PDF forms into the LiquidOffice form designer and converts them into intuitive HTML web forms
HMTL import	Imports an HTML form into a managed HTML or PDF LiquidOffice form and provides enhanced form processing
Process modelling	Easily models a business process with a drag-and-drop user interface, leveraging business rules and scripting to interact with people and systems and simulate for testing and validation
Process third-party external web form	Processes any web form hosted on any web server and adds intelligence to any form created in any web form application
Ad hoc routing	Simplifies review and approval processes with user-driven ad hoc routing of forms, information and documents
Anywhere/anytime access	Enables users to access forms and perform tasks from web, mobile and integrated user interfaces
Business activity monitoring	Enables decision makers to monitor business processes and use analytics to optimize performance
Audit and security	Securely connects employees, customers and partners inside and outside an organization with authenticated access to forms and audit trails

LiquidOffice features

Feature name	Description
Web desktop and portal	Provides access to published forms and processes and supplies the user interface for routing these forms and processes
Management console	Provides administration capabilities for all aspects of the server, including aggregation, analysis and presentation of business activity information through Business Activity Monitoring
Barcode support	Includes JavaScript barcode control for dynamic display of barcodes without applets
RESTful web services	Delivers RESTful Web Services tasks in studio for easier integration with REST APIs in other applications

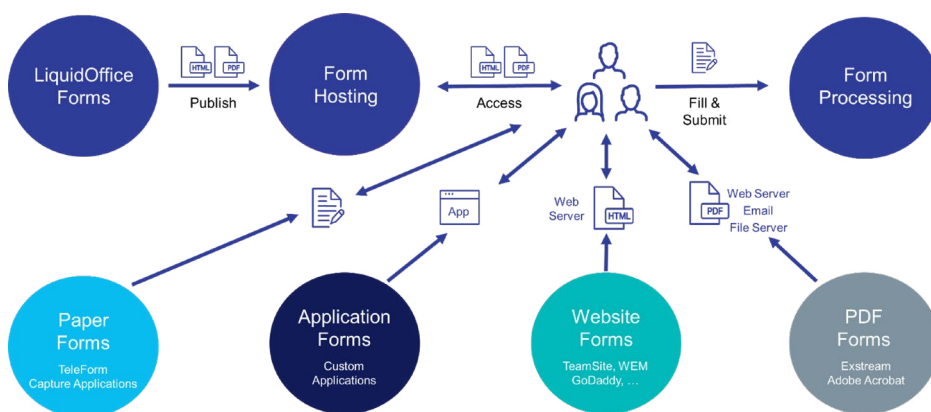
Optional features

Feature name	Description
Public access	Provides access to LiquidOffice for public users who do not have accounts on the LiquidOffice server
Email routing	Allows LiquidOffice users and anonymous users to route forms to email addresses
Mobile	Enables users to work with forms and processes on a mobile device
Offline forms	Enables users to save forms offline, allowing them to continue working on them later
Form packets	Provides tools to build nested, dynamics rules for end-to-end automation with predetermined compliance and full transparency to create form packets—a collection of forms bound together for processing
Enterprise access	Gives users who do not need to approve forms and processes log-in credentials and user profiles in LiquidOffice and allows them to initiate forms and profiles

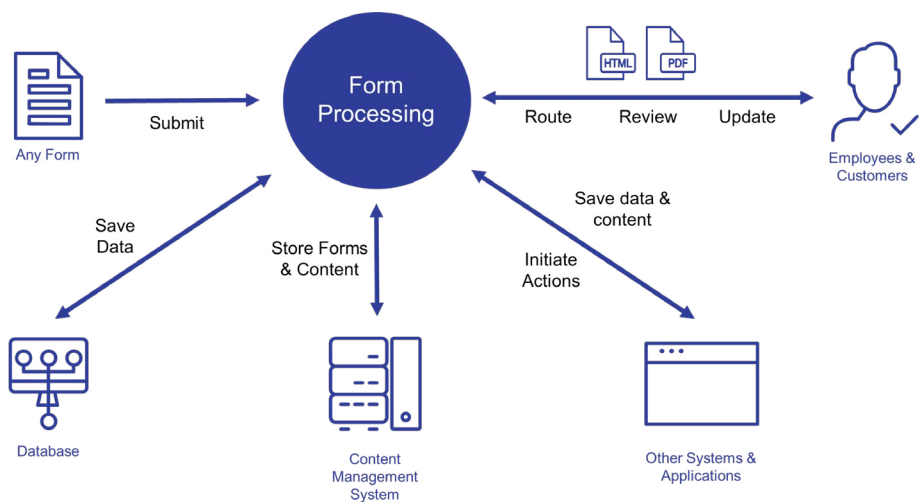
OpenText LiquidOffice integrations

- OpenText™ TeleForm™
- OpenText™ Exstream™
- OpenText™ TeamSite™
- OpenText™ Application Content Management
- OpenText™ Content Server
- OpenText™ Capture Center

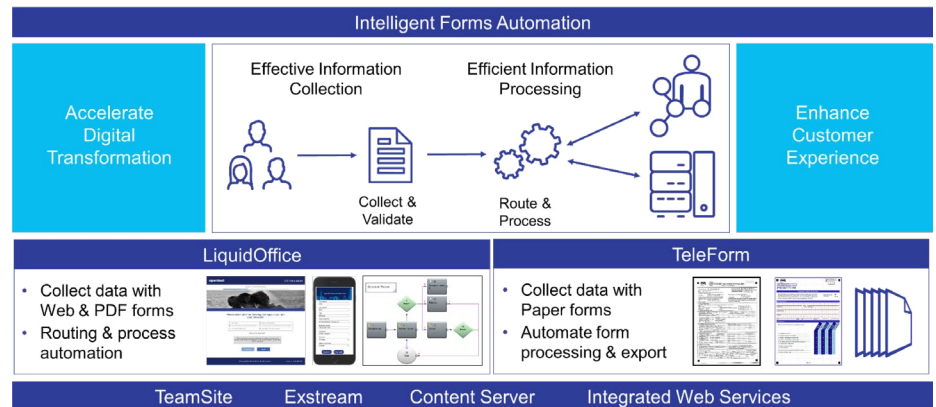
Intelligent Forms Automation integrated solutions



Intelligent Forms Automation integrated solutions—form processing



Intelligent Forms Automation with LiquidOffice and TeleForm



Employee solutions

- Information request (status of vacation request, travel approval)
- Service request (vacation request, travel request, software request)
- Enrollment (employee benefits, newsletter)
- Onboarding (new employee onboarding, IT systems access)
- Acknowledgement (SOP and policy training completion)
- Response (follow-up to project request)
- Reporting (timesheet, expenses, status report)

Customer solutions

- Information request (for a product or service, order tracking)
- Service request (insurance claim, loan application, customer support)
- Enrollment (conference registration, newsletter, contest)
- Onboarding (new customers, accounts, services)
- Acknowledgement (the GDPR, appointment)
- Response (follow-up to a customer-initiated request)
- Reporting (fitness tracking, contest)

Employee Performance Review Form

EMPLOYEE NUMBER	DATE OF REVIEW	REVIEW PERIOD COVERING:
SOC. SEC. NUMBER	DEPARTMENT/LOCATION	FROM TO

SECTION 1
Review and discuss the position description for clarification of duties and responsibilities, and reconcile any misunderstandings.

- 1. Job Knowledge.**
Consider how well employee applied the knowledge required to achieve acceptable standards of performance.
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory
- 2. Volume of Work Output.**
Consider how well employee successfully completed assignments or projects within expected time limitations.
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory
- 3. Accuracy of Work Output.**
Consider how well employee consistently meets the expected quality standards with minimum of check work.
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory
- 4. Utilization of Time.**
Consider how well employee organizes assignments and how consistently applies self to productive work.
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory
- 5. Punctuality and Attendance.**
Fruited less than 60 state actual number of days absent and tardy.
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory

OVERALL PERFORMANCE:
☐ Outstanding ☐ Excellent ☐ Very Good ☐ Generally Good ☐ Improvement ☐ Unsatisfactory

Improvement - Specific performance improvement plans should be detailed in second page section "B".
 Unsatisfactory - Reassignment or termination is necessary for employees in this category.

Employee Portal

Form Portal

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Human Resources

Employment Application Form

Complete and select "Submit" when complete

Information Work history Education Miscellaneous

First Name*

State Zip

Mobile Phone

Driver's License

Department Applying To:
☐ Accounting ☐ Administration
☐ Engineering ☐ Marketing
☐ Sales ☐ Warehouse

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Credit Application Form

BUSINESS INFORMATION

SERIAL NUMBER

NAME OF BUSINESS LEGAL NAME OF BUSINESS (if different) PHONE

ADDRESS CITY STATE ZIP CODE

DESCRIPTION OF BUSINESS

NO. OF EMPLOYEES CREDIT REQUESTED TYPE OF BUSINESS IN BUSINESS SINCE DATE

BUSINESS STRUCTURE ☐ Parent Company ☐ How long in business

COMPANY PRINCIPALS RESPONSIBLE FOR BUSINESS TRANSACTIONS

NAME TITLE PHONE

ADDRESS CITY STATE ZIP CODE

NAME TITLE PHONE

ADDRESS CITY STATE ZIP CODE

BANK REFERENCES

NAME OF BANK BANK BRANCH CHECKING ACCOUNT NO.

NAME TO CONTACT ADDRESS TELEPHONE NO.

TRADE REFERENCES

FURN NAME CONTACT NAME FURN TELEPHONE NUMBER DATE ACCOUNT OPENED

CONFIRMATION OF INFORMATION ACCURACY AND RELEASE OF AUTHORITY TO VERIFY

I hereby certify that the information in this credit application is correct. The information included in this credit application is for use by XYZ Company in determining the amount and conditions of credit to be extended. I understand that XYZ Company may also utilize the other sources of credit which it considers necessary in making this determination. I further authorize the bank and trade references listed in this credit application to release the information necessary to

SIGNATURE TITLE DATE

Click to Sign Submit Go

Customer Survey

Thank you for taking this brief customer satisfaction survey!

☒ Canada ☐ India ☐ USA

Product
Oh Henry

Rating
Fantastic

Comments
Love this candy bar!

Submit Cancel

Life Insurance Application

Question 3 - Tell Us About Yourself

Please select all of the following that apply to you and your household:

☐ I am single ☒ I have a child/children
☒ I am married in a common law relationship ☐ I am the parent of a child/children with a disability
☐ I am separated/divorced ☐ I am taking care of my parents

Why is this important?

When deciding on coverage, it's important to consider your loved ones' financial needs. Keep in mind that as your life situation changes, so does their need for insurance.

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