opentext™

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.

opentext™

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.

opentext™

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

opentext™

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
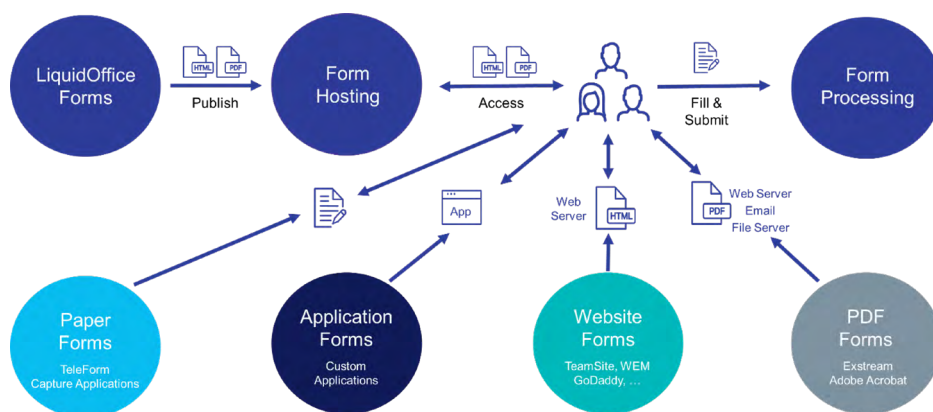
Intelligent Forms Automation integrated solutions—form processing

opentext™
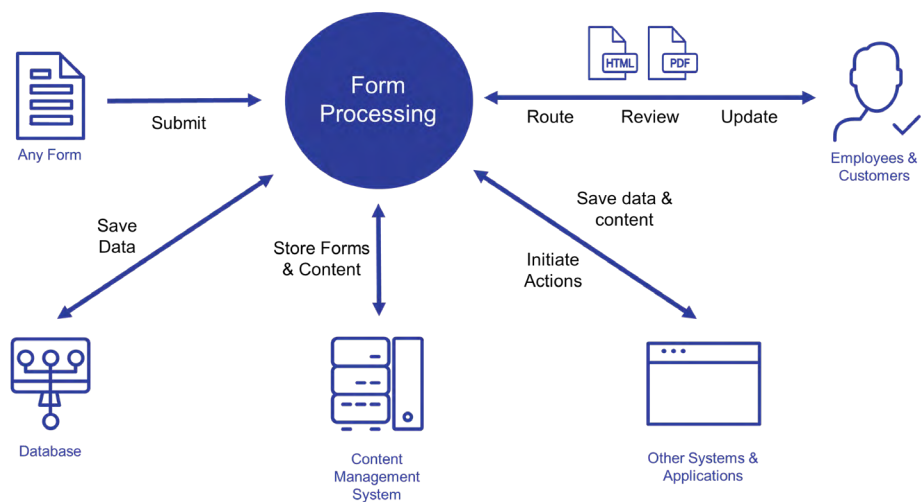
Intelligent Forms Automation with LiquidOffice and TeleForm
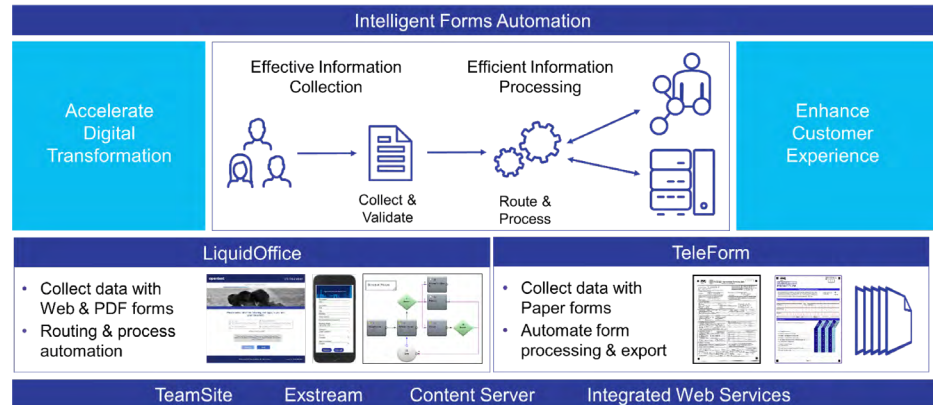
Employee solutions

- 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)

opentext™

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 ○ U

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 ○ U

3. Accuracy of Work Output.
Consider how well employee consistently meets the expected quality standards with minimum of checki
○ Outstanding ○ Excellent ○ Very Good ○ Generally Good ○ Improvement ○ U

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 ○ U

5. Punctuality and Attendance.
If rated less than GG, state actual number of days absent and tardy
○ Outstanding ○ Excellent ○ Very Good ○ Generally Good ○ Improvement ○ U

OVERALL PERFORMANCE:
○ Outstanding ○ Excellent ○ Very Good ○ Generally Good ○ Improvement ○ U

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

---

Employee Portal

Form Portal

General Form Templates

Desktop Web	Standard desktop web form template
Desktop Web Wizard	Desktop wizard web form template
Mobile Web	Mobile web form template

Finance Forms

Credit Application	Web & PDF form
Expense Report	Web & PDF form
Insurance Quote	Wizard web form
Invoice	Web & PDF form
Purchase Order	Web & PDF form

HR Forms

Benefits Enrollment	PDF form
Employee Review	Web & PDF form
Employment Application	Multi-page tabbed web form
New Hire	Web & PDF form
PTO Request	Web form
Security Card Request	Web & PDF form
Time Sheet	Web & PDF form
Travel Authorization	Web & PDF form

Other Forms

Document Review	Web form with attachments
Problem Report	Web & PDF form
Survey	Mobile web form
Camp Registration	Responsive dynamic web form
Conference Registration	Web form with embedded HTML

Human Resources

Employment Application Form

Submit

Complete and select "Submit" when complete

| ...ation | Work history | Education | Miscellaneous |

...nformation

First Name*

State   Zip

Mobile Phone

Driver's License

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

Credit Application Form

SERIAL NUMBER

BUSINESS INFORMATION

NAME OF BUSINESS	LEGAL NAME OF BUSINESS (if Different)	PHONE
ADDRESS	CITY	STATE ZIP CODE

DESCRIPTION OF BUSINESS   IN BUSINESS SINCE

NO. OF EMPLOYEES	CREDIT REQUESTED	TYPE OF BUSINESS	DATE
BUSINESS STRUCTURE -Select One-	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

FIRM NAME	CONTACT NAME	FIRM TELEPHONE NUMBER	DATE ACCOUNT OPE

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 applic... 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.Furth... hereby 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 am married/in a common law relationship
☐ I am separated/divorced
☑ I have a child/children
☐ I am the parent of a child/children with a disability
☐ 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.

[Previous] [Next]

opentext™

opentext.com/contact