

# EMC Documentum Forms Builder

## The Big Picture

- Deploy e-forms that fully resemble their paper counter parts, eliminating the overhead cost and risk associated with managing paper
- Easily create high-fidelity and web-based XML forms with a simple, point-click interface and seamless integration with EMC Documentum TaskSpace
- Leverage a common object model to reduce application complexity and accelerate change management
- Provide database look-ups, data validation, and auto-calculations directly from within the form, substantially reducing errors and re-processing costs

## Making high-fidelity and HTML forms intuitive, easy to create, and easy to manage

In order to lower costs, increase productivity, enhance customer satisfaction, and enable sustainable change within their organizations, corporations and government agencies are building process-centric applications. These applications are designed to facilitate and expedite processes that generally start with user-provided information, which typically involves filling out forms.

However, most forms used today are paper-based and subject to the typical problems inherent in manual data entry. Electronic forms relieve some of these challenges, but they often lack the fidelity and intuitive nature of their paper counterparts, which can slow user adoption and processing. In addition, both paper and electronic forms lack the needed integration with existing business application systems, thereby preventing the downstream processing of transactional data.

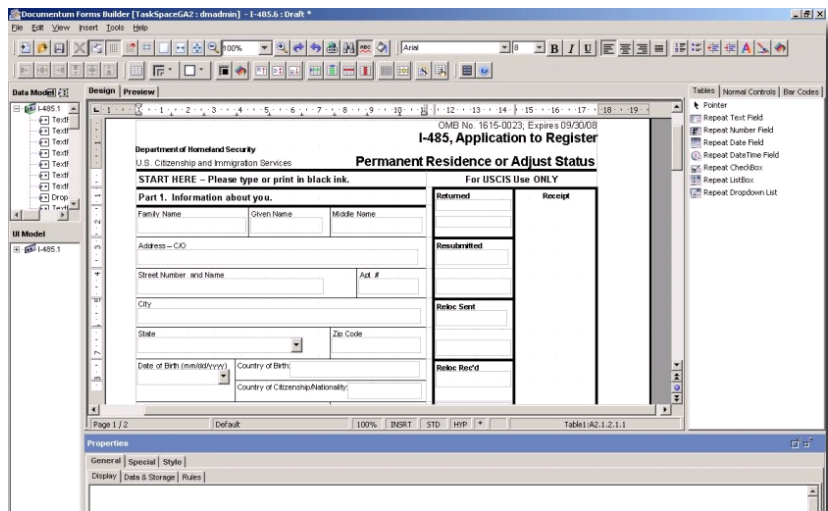
### Build flexible, intuitive, standards-based electronic forms

EMC® Documentum® Forms Builder helps organizations overcome these issues by providing both high-fidelity and HTML-based e-forms that directly integrate with the EMC Documentum platform and EMC Documentum Process Suite. Forms Builder leverages the power of electronic forms to accelerate work processing, eliminate manual data entry errors, and improve overall business performance.

With Forms Builder, you can quickly build flexible, intuitive, standards-based electronic forms that accelerate business processes. High-fidelity forms allow you to close the gap between paper and electronic forms, delivering a rich user experience while substantially reducing the costs and bottlenecks associated with paper-based processing. In addition, Forms Builder provides the flexibility of multi-channel delivery (print, e-mail, and web) and can be used with both EMC Documentum TaskSpace and EMC Documentum Webtop interfaces to reduce costly paper handling and enforce compliance policies.

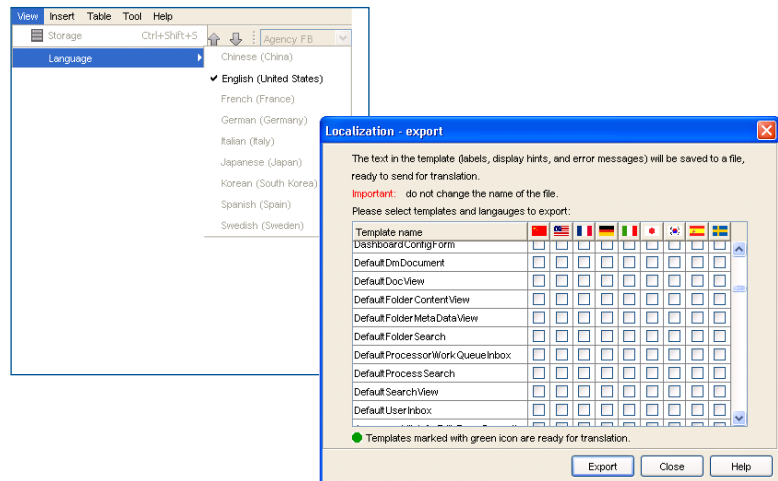
EMC Documentum Forms Builder provides forms designers and users with the following features and capabilities to accelerate the deployment of forms and associated processing:

- **High-fidelity forms:** Allows the creation of e-forms that fully resemble their paper counterparts, thereby eliminating the overhead cost and risk associated with managing paper documents.
- **Graphical forms design:** Enables high-fidelity and web-based XML forms created using an intuitive, point-and-click interface. Provides seamless integration with TaskSpace, allowing quick interaction with business processes and repository objects.
- **Shared data model:** Leverages the EMC Documentum Common Object Model, providing substantially reduced complexity and ease of change management when compared with third-party form products that require integration. As a result, high-fidelity forms can share the same data model as web forms, making it simple to have alternative views of the same form data based on role.
- **Offline form filling:** Provides network independence by allowing users to save forms locally and continue working while disconnected from the website or business application. If preferred, users can also submit the form via e-mail and leverage the capability of the mail program to send form information when reconnected to the network.



*Easy-to-use high-fidelity and web-based XML forms*

- **Dynamic barcodes:** Enables rapid auto-generation and recognition of data for forms that are filled out electronically but submitted via hard copy or fax. Supports automatic barcode encoding for values such as account number, last name, or other key identification data.
- **Dynamic field validation and data integration:** Ensures data accuracy and completeness by supporting database lookups, data validation, and auto calculations. Reduces reprocessing costs and accelerates work processing by validating the user input immediately within the web client. Conditional properties can be used to make form fields hidden or read-only based on business logic requirements. Form data can be accessed automatically and presented from multiple enterprise data sources, substantially improving user experience and productivity.
- **Dynamic table support:** Allows forms designers to create a large table with repeated fields on each row and meet requirements for tabular data management, such as for purchase orders or invoices.
- **Integration with the EMC Documentum repository:** Provides seamless integration with Documentum repository services, such as check in/check out, indexing, search, renditions, and notification. This means forms can be stored in a centralized repository for easy searching and reuse.
- **Reusable structured data:** Allows forms to be used to capture, validate, and reuse data throughout a process, as well as to initiate activities or complete workflow tasks within a business process, such as new account opening, P&C claims, commercial lending, vendor management, and court case management.
- **Audit trails:** Provides capture of the task performer audit history, including actions taken, decisions made, and additional actions required. All actions can be automatically stamped with date, time, and form status. In addition, updates to form fields can assist with collaborations for case management applications.
- **Digital signature support:** Enables users to sign form submissions digitally to prove that only they have submitted it and ensure that no one subsequently alters the data.
- **Enhanced package control for Documentum TaskSpace:** Allows the designer to specify whether to display the selected form package inline with TaskSpace. In the case of a package containing a document, documents are visible within a viewer. In the case of folders, contents of that folder are visible, along with the view of the selected document that is contained within it.
- **Action invocation:** Enables designers to add buttons that trigger a variety of actions when a user clicks them. These actions include both configurable TaskSpace actions as well as custom Documentum WDK actions. If the action displays a selection dialog, it is easy to populate data in the form on return. This is useful for operations such as looking up a customer or an account and then filling in the relevant data.



*Localization of a form template*

- **Form localization:** Provides interactive and flexible localization by translating forms directly in the Forms Builder interface. Forms can be exported as well to support translation of property file templates.
- **Form version control and record management support:** Ensures the use of only the most recent or specified versions of a form. Designers can maintain multiple versions of form templates, making it easier to phase in new templates while, at the same time, leveraging older ones. Automatically captures and archives forms templates and associated data as a formal document of record, further reducing compliance risk.



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### Take the next step

To find out more about using EMC Documentum Forms Builder to improve transactional processing, visit [www.EMC.com](http://www.EMC.com) or call 800-607-9546 (outside the U.S.: +1-925-600-5802).