CARDIFF
LIQUIDOFFICE™

Business Process Management & Intelligent Documents

Cardiff LiquidOffice

People. Information. Process.

LiquidOffice encompasses the entire business process management lifecycle from process design and simulation to deployment and optimization. However, it goes well beyond traditional process management. LiquidOffice embeds intelligence within forms and documents, enabling them to securely and automatically navigate the process between people and systems, offering visibility into each step of the process and a complete audit trail.

LiquidOffice is a cornerstone element of the Cardiff Intelligent Document platform, which offers the industry's most comprehensive and versatile information capture and business process management capabilities. Cardiff Intelligent Documents streamline and simplify the complex maze between people, documents and processes that are critical to businesses, with a flexible and scalable architecture and no barriers between paper, online and mobile information. Cardiff Intelligent Documents are the information and process onramp to the enterprise, dramatically reducing costs, shrinking process cycles and offering complete visibility into business process status at every step.

Features

eForms

Cardiff LiquidOffice eForms™ is a powerful, Web-based software solution for creating, deploying and automatically managing the routing, tracking and approval processes for electronic forms. LiquidOffice eForms' capabilities range from internal corporate "Web forms" to the comprehensive rules-based forms that drive the core of an organization's business.
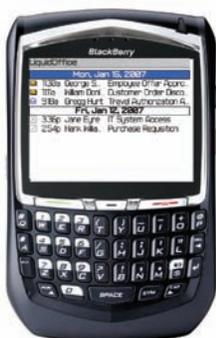
Paper Automation

One of the most powerful capabilities built into LiquidOffice is the ability to seamlessly capture paper forms and documents and connect them to processes that may already be active. In fact, LiquidOffice is the only integrated and unified solution that supports a single, consistent and auditable business process to be applied to both electronic and paper information streams. For users, this means they have the option of submitting paper forms or electronic forms. In situations where a wet signature is required or where federal or state government mandates require both options (paper and electronic forms) to be offered to consumers, this capability is critical.
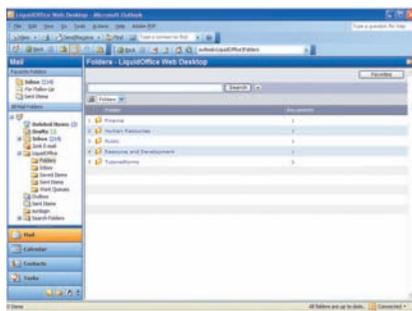
Mobile Support

LiquidOffice Mobile revolutionizes how people access and influence in-flight business processes and real-time data using mobile devices.

LiquidOffice Mobile empowers decision-makers to access, review, digitally sign and approve steps in pivotal business processes on their mobile device in a manner that is secure, auditable and compliant.

> *"Intelligent Documents: A breakthrough link between information management and business process." - Gartner*

Outlook Integration

LiquidOffice integrates seamlessly with Microsoft Outlook. A LiquidOffice folder can be automatically pushed to the Microsoft Outlook client allowing users to navigate to the LiquidOffice Folders, Inbox, Sent Items, Saved Items, and Work Queues.

Dynamic Packets

Based on the information that a user provides in either a paper or online form or document, LiquidOffice automatically and dynamically creates a packet of relevant forms and documents. Business rules combined with the user's information dictate what forms and documents are included in the packet, what pages are included in each of the forms, what fields are included on each page and how the information in the packet is routed. This is a critical first step in many onboarding processes.

Digital Signatures

LiquidOffice supports three levels of digital approval and signatures. LiquidOffice includes support for self authenticated and password/PIN protected digital form approval in HTML and PDF. LiquidOffice also supports certified PKI digital signature handlers.

Wizard Forms and Form Chaining

LiquidOffice provides the capability to create forms that step a user through a series of directed questions. These wizard-like forms provide users a simple interface to enter information and guide them through to completion of a form or task.

Embedded Barcodes

LiquidOffice generates 1D or 2D barcodes on forms and populates the barcodes with field data. Users can then fill a form out online, print it, and when faxed, mailed or scanned in, LiquidOffice automatically recognizes the form and data via the barcode, and easily pushes the form and data back into the process.
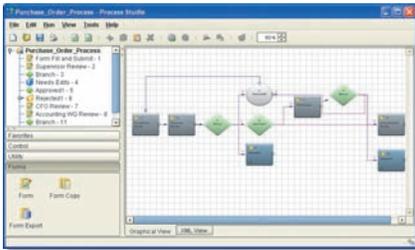
Dynamic Forms

LiquidOffice allows users to dynamically add rows of data entry fields to a table on a form. Users can also remove rows that were added dynamically but were not actually needed. The form will expand and contract appropriately.

Process Modeling

Process Studio

Process Studio provides a graphical user interface that allows designers to view and manipulate processes as they are designing them. Tasks are organized into customizable drawers making them easily accessible. An XML view of the process is easily accessible via the GUI. A simulation of the process can be run inside Process Studio to test the execution of each task in the process. It is a Java-based application that can run anywhere.

Process API

The functionality available in the Process Studio is exposed through the Process API. Designers have full control of the object models with access to all of the methods inside of the classes. Designers can use BeanShell or Javascript scripting languages. The Process API even allows designers to dynamically create new tasks.

Form Designer

LiquidOffice Form Designer is a drag-and-drop application that provides an intuitive, easy-to-use interface while offering powerful tools, such as "snap-to" guides and comprehensive field setups, for advanced form design. LiquidOffice Form Designer comes with a wide selection of sample forms and a Gallery of pre-made form and field templates. Custom form elements can be created and saved into the Gallery, facilitating corporate standards for forms creation and design.

Process Orchestration

Structured Business Processes

Powered by intuitive drag-and-drop technologies, LiquidOffice accelerates the design and execution of structured processes for unique business requirements and regulatory compliance needs. No programming expertise is required. To effectively map structured workflows based on defined business rules, LiquidOffice provides advanced features such as:

- *Process simulation*
- *Library of predefined tasks*
- *Sub-processes*
- *Built-in templates*
- *Conditional transitions*
- *Serial and parallel routing*

User-determined Processes

LiquidOffice enables an immediate reduction in transfer and queuing times on a broad scale of processes through its unique user-determined workflow capabilities.

On-the-fly Process Alteration

Unique to Cardiff, this powerful capability allows enterprises to dynamically modify business rules, conditionally alter the process map, and effectively allocate responsibilities for a given task.

With this capability LiquidOffice gives organizations the agility they need to respond to changing market conditions, and optimize complex processes that are not easily created beforehand.
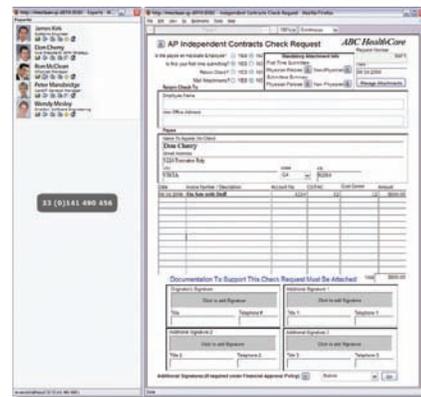
Decision Management and Process Intelligence

LiquidOffice provides comprehensive monitoring and management features that protect investments in processes, provides greater visibility into business needs, and helps enforce compliance requirements across the enterprise. With the ability to identify bottlenecks, audit usage, analyze processes and handle exceptions, LiquidOffice makes real-time improvements to the processes that drive businesses.

Expertise Recommendation

Unlike traditional business process management solutions that simply track the processes being completed, LiquidOffice automatically builds upon an understanding of the processes being completed and the people who are expert in their execution.

All of the information captured from Cardiff's Intelligent Documents is aggregated in context to build a process expertise map that is meaningful to the organization and users. Cardiff automatically identifies a list of individuals or content within the organization relevant to the same or similar situations and decisions and presents it to the user who is interacting with the document in order to expedite and improve the decision of the user.

Reporting

LiquidOffice allows organizations to monitor business processes and run ad-hoc or scheduled reports, increasing visibility into how the business is running. The wizard interface provides a simple, point-and-click environment to step through the design of reports.

Auditing

LiquidOffice ensures compliance by transparently creating an audit log of all user and administrator activities and provides the security of both HTML and PDF digital signature support.

In-process Enterprise-class Search

The market's first and only "in-process" enterprise-class search surfaces content at the right step and time in a business process. As soon as a document is created or modified, it is pushed to the search engine for indexing. This results in better, faster decisions made in a more complete context.

Business System Connections

Providing more than 300 pre-built adapters, Cardiff allows organizations to transfer data between the Cardiff Intelligent Document solution and nearly any business system with ease. To an organization, this means having the ability to leverage Cardiff Intelligent Documents as one unified user, data and process interface even for business processes that interact with multiple systems. Some of the pre-built adapters include: Oracle, Peoplesoft, SAP, Lawson, IBM, Sharepoint, OpenText, EMC and many others.

Industries

Government

Tax forms, vehicle registration, business licenses, forms processing

Healthcare

Patient enrollment, insurance claims, prescription orders, revenue lifecycle

Financial Services

Loan applications, credit reports, new accounts, remittance, cash management

Manufacturing

Service requests, job orders, change control

Education

Admission applications, financial aid, student transfers, grants

Solutions

Human Resources

Employee self-service, employee onboarding, all personnel and policy forms

Accounting

Expense reports, purchase orders, requisitions, invoices, financial forms, compliance

Marketing

Co-op marketing requests, lead processing, customer surveys

Production

Work orders, engineering change related documents

Sales

Sales forecasting, business reports, sales order processing

Support/QA

Bug reports, feature requests, customer feedback

Platform Support

LiquidOffice Server
- *Windows 2000/2003, Linux Red Hat 4, Sun Solaris 9/10*
- *English, French, German (Windows only)*

LiquidOffice Presentation Server
- *Tomcat 5.5 (Default), BEA Weblogic 9.0/9.2, IBM WebSphere 6.0/6.1*
- *Presentation Server only*

Management Console
- *Windows 2000/XP, Mac OS 10.4.8*
- *English, French, German*

Web Desktop
- *Windows 2000/XP, Mac OS 10.4.8*
- *English, French, German*

Browser Support
- *Windows – Internet Explorer 6/7, FireFox 2*
- *Mac OS – FireFox 2, Safari 2.0.4*
- *Required for Management Console and Web Desktop*

Process Studio
- *Windows 2000/XP, Mac OS 10.4.8*
- *English, French, German*

Form Designer
- *Windows 2000/XP*
- *English, French, German*

Internal Database
- *MSSQL 2000/2005, Oracle 9i/10g*

LDAP Server
- *Active Directory 2000/2003, Oracle Internet Directory 10g, SunONE Directory Server 5.2, eDirectory 8.7.3*

Mail Server
- *SMTP Required for LiquidOffice email notification*

BlackBerry Smartphone
- *OS V4 and higher*

Min. Server Specifications
- *Intel/AMD/UltraSparc Processor, 1GB RAM, 10GB Disk Space*
- *Recommended initial configuration*

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an Autonomy company

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