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# ***DocForm***

## ***Document Management Software***

### ***White Paper***



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## 1. DOCFORM OVERVIEW

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DocForm is an intelligent, dynamic document generation and delivery application that solves the problems companies are having with their printing and document processes. It provides a total solution for creating all types of business documents, forms, reports and more, along with managing the data associated with them.

Companies are faced with managing the rapid increase in the volume and complexity of corporate documents. According to DMIA's FORMTRAC 2002 study, the forms industry has grown to \$13.7B. Companies need the ability to solve the corporate document problem with a complete solution that simplifies the management and delivery of documents across the enterprise.

The rapid change of business is increasing pressure on corporate document systems. Businesses are facing new and different competition with ever increasing expectations on performance. Often changes by companies to their patterns of business communications are fueled by their customers demanding more from them.

Mergers and acquisitions only exaggerate this problem by adding to the volume of documents to manage and increasing the number of disparate and incompatible data formats in the corporate environment. Integration among these systems complicates business communications.

Time pressure is forcing businesses and consumers alike to be more and more selective with the documents they review. Never has the demand for customized documents been higher. With time demands only going to increase in the future, the requirement for documents to be specifically tailored to the unique individual receiving it will only increase over the next few years.

With the rise of Internet and other digital technologies, the need for multi-channel communications has been created. Having printed document delivery alone is often no longer sufficient. Whereas in the past, systems have been printing specific, businesses are now embracing technology that reaches customers where they are in multiple formats.

Repeatedly producing the same content for delivery across different channels creates burdens on internal I.T. infrastructures. The ability to generate a document once and be able to dynamically repurpose or have multiple distributions is now becoming a necessity.

Products currently attempting to address these challenges have been solution oriented with extensive time required for configuration and services to get the systems operational. Often they required highly skilled programmers and technical professionals. Another complicating factor with many of the solutions on the market today is the need for extensive customizations requiring weeks or months of extra services.

DocForm overcomes these challenges. Using DocForm could be as simple as creating an electronic form, mapping data to the form, and then printing the form on your printer. DocForm also powers more elaborate applications, since DocForm lets you integrate with your existing systems, merge and manage the variable data those systems produce, apply rules for dynamic conditional processing, and then routes the new customized documents to one or multiple outputs such as print, fax, email, COLD, or other applications.

## 2. DOCFORM INTEGRATION WITH EXISTING SYSTEMS

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Integration is a key strength of the DocForm product. DocForm is used to manage variable data produced by back-office systems such as mainframes, AS/400's, Enterprise Resource Planning (ERP) systems, databases, and legacy applications. Since DocForm integrates at the data level, it bypasses many of the complications typically associated with integration projects.

No reprogramming of existing back-office systems is required when using DocForm. The product is often described as a non-intrusive solution for this reason. DocForm does not require custom API's to be written and managed.

Since DocForm receives data directly, it functions in a cross platform manner. It does not matter what operating systems or type of application is generating the data. The data can come from diverse environments including Windows, Unix, Linux, or Legacy.

The applications producing the data can be written in any language. Cobol, C++, RPG, and C# are just a few examples of the many types of languages that you may incur when implementing the product.

DocForm makes use of three primary mechanisms for receiving data inputs: printer port monitor, directory watch, and input data filters. A DocForm user may choose one or more of these options based on their unique environment.

### Printer Port Monitor

This option allows data files to be sent to DocForm as if it were a printer. DocForm operates on your network as a virtual printer. No intermediate steps need to happen, the data is received directly into the DocForm product.

### Directory Watch

This option allows for data files to be sent to a file directory that DocForm will "watch." Files are then extracted from the directory and processed. DocForm works with any directory where files can be accessed in Windows NT/2000/XP. This includes network directories, provided a standard network interface card (e.g., Ethernet) and network drivers are installed on the host PC.

### Input Data Filters

DocForm allows for several different data formats to be used as input into the product. ASCII text files are the desired input format but host data input such as AFP and PCL can also be directly loaded into DocForm. Managing these input data streams require no changes or expensive reprogramming to the original host applications. This saves valuable time and effort as DocForm's Input Filter process takes PCL and AFP data files and extracts the ASCII data for use within the product.

## **Input Filter Settings**

DocForm's input filters perform numerous data management functions on incoming data streams. The use of these input filter options gives the DocForm user additional control when:

- Incoming data is unformatted
- Incoming data is in a non-ASCII format
- Multiple data formats are being used
- There is a need for minor modifications to incoming data streams

The process for using these input filter settings are easy and after they are initially setup they don't need to be reconfigured each time the product is used.

### **1) Language Filters**

DocForm's Smart Filtering technology allows it to take PCL and AFP formatted data files and produce ASCII data that retains the original character and line spacing – even for absolute positioned characters. This feature enables DocForm product users to retain current PCL and/or AFP data formats so host generated modifications are not required.

#### **ASCII Data Filter**

ASCII is the native input data format. ASCII files that are CRLF delimited with Form Feeds embedded will process directly into DocForm with no filtering or modification required. ASCII data without these delimiters can be modified within the Input filter process to add page breaks, etc. to present the data in the proper format.

#### **PCL Data Filter**

PCL print stream files, which include embedded readable text, can be filtered and output to DocForm with no changes required to the original data.

#### **AFP Data Filter**

Data files in IBM's AFP format are parsed by the filter and the data is extracted, with no changes required to the original data.

#### **Other Data Formats**

DocForm can also work with other data formats such as Xerox DJDE/Metacode and Postscript if required.

### **2) The Search and Replace Filter**

DocForm users have the ability to modify ASCII data files to easily add tabs, spaces, form feeds, carriage returns, line feeds, etc. This is useful for identifying and correcting lineup issues within the data file so that the page formatting is setup properly for easy data mapping within the DocForm form editor.

### **3) Page Dimensions Filter**

This filter sets the maximum number of rows and columns on a data page. This is useful for formatting ASCII files that may have lost (or never had) page dimension formatting tags that are be used to break the input data into readable, usable pages.

## **3. DOCFORM DOCUMENT DESIGN**

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DocForm has been built to be an easy to use tool for designing new documents. The new documents will be designed as electronic forms that are stored in the software. No need to have pre-printed forms anymore. Control the exact layout of all your documents. Move or change the location of elements across the document or form. Editing a document has never been so easy.

### **Split Screen Design**

The popular split screen DocForm design environment provides the DocForm user the ability to view source data on one side of the screen while having the ability to directly map the data over to the new form on the adjacent side of the screen. Avoid the nuisance of having to repeatedly switch between screens. The split screen approach provides an intuitive design approach that accelerates document design time.

### **Data Mapper**

The Data Mapper serves as the window to your source data and occupies the left side of the application. This is the starting point for building new forms. From the Data Mapper, users will map data to the other primary window, the Forms Editor. Use the horizontal and vertical rulers to precisely measure your location on the Data Mapper.

### **Forms Editor**

The Form Editor is the dynamic design environment for new forms. It occupies the right side of the application and from it you will build the new electronic forms and documents. Within the Forms Editor, you have a variety of tools to customize your new documents. This is where you will edit your mapped boxes from the Data Mapper. Easily access drawing tools for arrows, lines, boxes, circles, and graphics from the toolbar in the Forms Editor. Selection of fonts and color would also be done in the Forms Editor.

### **Project Tree**

The Project Tree provides a detailed inventory of Form elements listed in a vertical fashion. It is available on the left side of the application as an alternative tab to the Data Mapper. The Project Tree provides a different view of all the elements included on the current Form. It's useful as a quick reference when designing documents. Form elements are automatically populated on the Project Tree and there is no requirement to use this alternative view, if the user prefers only the Form Editor.

### **Print Preview**

Proofing a document is made easy in DocForm. By using the print preview function, the user can review exact representations of documents as they will look when they are printed by just paging through the document by clicking the forward and back buttons. Since this review and proofing is done before actual printing, costs are reduced by significantly reducing errors and mistakes.

## **Distributed Design**

DocForm supports multiple DocForm designers. In situations where multiple users in an organization have the need to design documents, multiple instances of the DocForm Designer (client software) can run simultaneously. This is especially useful for DocForm users at remote locations. It gives them access to create, edit, and run the application.

## **Anchor Blocks**

Use this advanced design feature to precisely manage the placement of data onto a new document. One of the biggest challenges a user can have is when the host system is producing variable data that “floats” or “slides” across a page with an irregular pattern. One time a header, address, total, etc. is aligned in a specific location and later on, it is 3 or 4 spaces over – unexpectedly.

Anchor blocks solve this problem. Set the anchor in a specific location. Then assign a “child” block, which will maintain a relative position to the anchor. This positioning mechanism will ensure that even irregular patterns of data are mapped and printed accurately. It will automatically correct the data placement, only when needed, as data is dynamically processed through DocForm.

## **Dynamic Barcode Generator**

By using the Barcode Generator object, a DocForm user can draw a specific area on the document where the barcode should appear. Then all the user needs to do is map the data from its original location to the new barcode location and DocForm will generate the barcode dynamically as documents are processed. DocForm produces both 3 of 9 (also called Code 39) and PostNet barcodes.

## **Form Templates**

To enable DocForm users to quickly design forms and begin using the product, DocForm comes with several pre-designed forms or form “templates” that can be used as a starting point to use and modify as desired, without having to start from scratch on a new form design. Users can simply select the appropriate template and the form is loaded and ready for modification or data mapping. There is no requirement to use the existing form templates.

## 4. DOCFORM OUTPUTS

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### Printing Output

DocForm is a powerful print-centric document design tool. It processes and produces output in numerous data formats, which in turn, support most all printers on the market today. DocForm outputs the following formats:

- Postscript
- PCL
- TIFF
- ASCII
- PDF

### Access Print Drivers

DocForm uses Windows print drivers and allows users to take advantage of any advanced print options provided by the device. Using this feature is simple, since it's accessed through the traditional finishing feature dialog box that prompts users after they have chosen to print a document. Make your selections and print as you normally would from this familiar interface.

This maximizes the use of all available functionality on the printers. Keep in mind that DocForm can't add finishing features to print jobs that are not supported by the device.

Examples of advanced print finishing features are:

- Stapling
- Duplexing
- Whole punching
- Saddle-stitching
- N-up printing

### Distributed Output

DocForm prints to any device available on your network. With manual printing, the user would select the network printer each time they print. This can also be configured to print certain print runs to a specific device in a dedicated manner without manual selection each time.

Whether that printer is in the next room, the next building, or across the country, if you have network access to it, then you can print to it. This provides an enhanced ability to communicate and collaborate across distributed locations. It also provides the opportunity for closer management control.

### Email Output

DocForm supports email output by producing documents that are first staged in a specific folder from which they are launched out of after the user configures the broadcast. Within DocForm, the user would select the output file menu and then specify both the server name and the recipient's email address. The sending of emails can be configured to operate automatically as well.

## **File Directory Output**

DocForm supports file directory output by producing documents that are directed to specific locations – file folders - on the network. This output mechanism is commonly used when integrating with other software applications such as workflow, content and document management, and ERP systems.

## **Fax Output**

DocForm supports fax output by producing files in either TIFF or PDF format. These files are routed to specific network folders that are watched by a fax server. Upon finding the file in the folder, the fax server then sends the fax output. This configuration supports implementations with most all leading fax server providers.

## **Web Output**

By producing PDF documents, DocForm delivers content that is web ready. These PDF documents can be posted directly to a website. Often these documents can be passed on to a specific web content management system that makes the document available over the web. Typically this is done by routing the PDF document to a folder within the web content management system.

## 5. DOCFORM – INTELLIGENT DOCUMENTS

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Intelligent documents are achieved by using conditional processing or business rules. Much of the power of DocForm rests in its ability to dynamically process documents in an intelligent way. These rules are set up by the user to achieve automation of processes.

### Dynamic Document Composition

Customize documents with conditional processing. Examples of common applications of dynamic composition are:

- Inserting the company logo on billing documents.
- Inserting graphic or images to improve the visual appeal of documents.
- Inserting promotional text or coupons on documents to increase sales.
- Inserting text messages on documents to cross-sell or up-sell additional products.

### Databases

Intelligent document composition is often driven by the ability to retrieve records from databases. Since DocForm is ODBC compliant, it can access records from the major database systems such as Oracle, DB2, MS SQL Server, MS Access, and many more. Using databases with DocForm is made easier by the Table Definition Wizard described in a following section.

### Document Distribution

Share documents more efficiently using DocForm. Conditional Processing can be used to route print jobs to multiple printers. This would also be the mechanism to achieve distributed printing. Directing documents to multiple outputs such as printers, fax, and email would also need to be configured using conditional processing. Enterprise Report Distribution (ERD) is an example of dynamically producing documents that then get routed to different printers across an organization.

### Document Repurposing

DocForm avoids the problem of having to generate the same document or content multiple times. Use DocForm to dynamically compose the document and then reformat and deliver it repeatedly. This reduces the burden on back-office and legacy systems that are producing the source data. Improve efficiency and reduce costs by using this approach.

### Processing Automation

Of course manually approving each print job is always an option. In addition, rules or conditions can be set up in DocForm to automate printing and document processes. Still maintaining control, DocForm users can establish scheduling of print jobs to match their specific needs. This is often a great choice for processes that follow a regular pattern. For instance, perhaps running large jobs at night makes the most sense for some companies. Examples of this type of automation are:

- Real-time printing
- Batch printing
- Time specific or target time printing

## **Flexibility with Intelligent Documents**

Most products offering the ability to set business rules are limited and complex. Conditional processing within DocForm is more powerful because it can be achieved two ways, through the use of wizards and by access to programming languages. By having both options with DocForm, the product becomes the most extensible on the market.

## **Graphical Wizards for Conditional Processing**

DocForm makes conditional processing easy by using wizard interfaces to lead users through setting up conditions. This brings the power of conditional processing to non-programmers.

### **Report Definition Wizard**

This wizard can be used to assist in handling data overflow conditions that can occur when there is more data than can be displayed on a single form page. The DocForm Report wizard manages these form overflow conditions and provides a step-by-step process to work with input data that exceeds the capacity of a form.

When completed, the DocForm user will have generated additional output forms as necessary, and report “summary” information (e.g., totals) will only be printed on the last output form document.

### **Table Definition Wizard**

This wizard provides a simple interface for defining tables within a project that can extract data from either a flat file or an ODBC database. Once the table definition has been created, it can be used to read data into tables that can then be merged with input print streams to produce printable documents or used for dynamic conditional processing, such as looking up email addresses based on names extracted from the input stream.

## **Scripting with Programming Languages**

DocForm continues to excel even when challenged by the complex requirements of unique corporate environments. With direct access to programming languages within DocForm, advanced users can script exactly the customization to the product they need. This provides limitless extensibility to DocForm. Users may never need to extend beyond the defined features within DocForm, however if they have the need or desire to write a script, DocForm will be able. Other products in this category offer only an IDE module. Most vendors offer no direct scripting option at all. DocForm users have two options when scripting, either JavaScript (JScript) or Visual Basic (VBScript).

## 6. DOCFORM ADMINISTRATION

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DocForm's architecture is client-server. All document design is handled through the DocForm Designer client and then saved and processed on the DocForm Server, which is the run-time engine for the product.

The DocForm server runs as a Windows service and allows for the automated (unattended) processing of DocForm developed projects. The server service is automatically installed and started upon DocForm product installation. Once the DocForm server is activated it waits for data files to be delivered either to a watched directory or to a print queue via a DocForm printer port.

When a new data file arrives on an input, either watched directory or print queue, the server process routes it to the project that has been set up for that particular input. The project then begins processing the file on a separate thread of execution. In this way, multiple projects can be processing input simultaneously, allowing the DocForm server to take advantage of multiprocessor systems.

New projects can be uploaded to the server without having to stop the service or interrupt projects that are already running, and existing projects can be modified without having to interrupt execution of the service; the server will detect that the project has changed and restart it automatically.

### **Operating Systems Platforms Supported:**

DocForm is compatible with the Microsoft ® Windows ® NT 4.0, Windows 2000 Professional, or Windows XP Professional operating systems.

- Microsoft Windows NT 4.0 Workstation (SP6 and Higher)\*
- Microsoft Windows NT 4.0 Server (SP6 and Higher)\*
- Microsoft Windows 2000 Professional (Retail and Higher)\*
- Microsoft Windows 2000 Server (Retail and Higher) \*
- Microsoft Windows XP Professional (Retail and Higher)\*
- (\* Specific Computer Manufacturer versions or core modifications to the operating systems are not supported. Operation Systems must be 100% Microsoft standard).

### **Hardware Platform Minimum Requirements:**

- 100% IBM Compatible Computer
- Intel Pentium III 600 or greater
- 128 Megabytes of system RAM or greater
- 5 Gigabytes of free hard disk space on the primary "c:" partition
- 256 Color or greater VGA display
- Keyboard
- Mouse or other Pointing Device
- 4x CD-ROM or greater

### **Recommended Platform Requirements:**

- 100% IBM Compatible Computer
- Intel Pentium IV 1 GHz or greater
- 256 Megabytes of system RAM or greater
- 10 Gigabytes of free hard disk space on the primary "c:" partition
- 32-bit Color SVGA display
- Keyboard
- Mouse or other Pointing Device
- 12x CD-ROM or greater

## 7. DOCFORM APPLICATIONS

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DocForm is a valuable and mission critical tool applicable across a wide range of industries and departments. Other solutions on the market are limited to only addressing a narrow set of applications. DocForm is a complete solution because it is a flexible document platform.

Often as companies are modernizing their printing and document systems a phased approach is best. Improving just one or two documents and their associated processes, printing checks or invoices for instance, can have a tremendous initial Return on Investment and as more projects get included, returns will continue to improve. The following are some examples of how DocForm can be used.

### Corporate Finance and Accounting

- Invoices
- Statements
- Purchase orders
- Credit notes
- Financial reports
- Remittance reminders

### Manufacturing and Distribution

- Inventory lists
- Pick lists
- Materials reports
- Barcode printing
- ERP printing
- Shipping manifests
- Import/export forms

### Sales and Marketing

- Sales reports
- One-to-one marketing materials
- Customized direct mailings
- Catalogs
- Pamphlets
- Coupons

### Human Resources

- Employee handbooks
- W-2's
- Job applications
- Insurance and health forms
- Surveys
- Training materials

### General Corporate Uses

- Modernizing green/gray bar reports
- Multi-page forms
- Mail merges
- Booklets
- Letters

### **Banking and Financial Services Industry**

- Customized account statements
- Targeted promotional offers
- Cross-selling and up-selling marketing materials
- Differentiated applications and forms

### **Insurance Industry**

- Insurance applications
- Underwriting forms
- Explanation of benefits forms
- Booklet of approved healthcare providers

### **Healthcare Industry**

- Health plan enrollment forms
- Office visit forms
- Medical history forms
- Health and dental cards
- Prescription forms
- Hospital admission determination forms

### **Education Industry**

- Student grade reports
- Admission authorization forms
- Emergency parent/guardian forms
- Attendance forms
- Service request forms
- Student schedules

### **Government Sector**

- License forms
- Tax forms
- Vendor approval forms
- Zoning permits
- Vehicle registration forms
- Voter registration forms

### **Modernizing Legacy and Back-Office Printing Applications**

- Use pre-built input data filters with DocForm for ASCII, PCL, and AFP data streams to standardize and manage variable data produced by legacy and back-office systems
- AFP filter integrates with IBM printing systems
- PCL and ASCII filters integrate with ERP, back-office, and legacy systems
- Leverage existing resources, eliminate reprogramming, and improve efficiency

### **Migrate Xerox Metacode Forms**

- Use MetaFormConvert (add-on module) to take existing Xerox Metacode forms, convert them, and directly import them into DocForm creating native DocForm projects
- Save time and money along with the ability to have full editing for imported forms with DocForm
- Eliminate redrawing forms, leverage existing resources, and migrate to an open environment

## 8. MICROSOFT .NET ARCHITECTURE

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DocForm is written with Microsoft's .NET development platform. Since its introduction, the .NET Framework has increasingly won technical acclaim. It has been designed to have both enterprise class quality along with all of the most modern tools for advanced application development. Notably, the .NET framework includes over 6,000 pre-built classes. This development platform provides significant advantages to DocForm over competitors using other older platforms.

### Improved Stability and Reliability

Microsoft's .NET development platform creates more stable and reliability applications. Because developers can make use of all the pre-built classes, errors are much less likely. Also, the Framework automatically detects and recovers from errors such as deadlocks and memory leaks to ensure application availability.

### Development Efficiency

By using both the pre-build classes and having code be re-usable across the application, engineers are able to focus on key development issues and not have to spend as much time coding basic features. Now engineers will be allocate more time than ever before to develop advanced features.

### Faster Product Development

Re-usable object oriented code and pre-built classes speed the development of products. The benefit of faster development cycles is accelerated product updates for the end users.

### Advanced Technology Platform

While including all the typical developments tools engineers need today, .NET distinguishes itself by also positioning itself as a platform for future internet-oriented development. The .NET framework provides support for all the latest technologies such as XML and Web services. In addition, the industry's rapid adoption of this platform has created a tremendous amount of other .NET applications that you could integrate with now and in the future.

### Easy Deployment

The .NET framework is designed to make deploying and updating .NET applications easy. Microsoft employs a no-touch approach by providing the ability to copy the application directory to the target machine, which greatly reduces the complexity involved with installation and configuration.

### Additional Resources

There is a lot of information available on the .NET framework. Use these links to start learning more about the .NET Framework:

[www.microsoft.com](http://www.microsoft.com)  
<http://www.microsoft.com/net/basics/whatis.asp>  
<http://www.microsoft.com/net/basics>

## 9. CONCLUSION

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DocForm breaks new ground as an intelligent, dynamic document and form generation and delivery application. Its ease of use makes it a tool that employees can use across your company and accelerates the implementations of projects. DocForm's flexibility means that it becomes the best choice for a variety of applications from check printing in finance, to barcode printing in distribution, to customized marketing materials in marketing.

Use DocForm to achieve personalized and powerful communication. Improve communications across your enterprise and between customers, partners, and your company. Design and generate customized documents dynamically with DocForm. When it's time to change your documents, DocForm's graphical interface provides an environment to get the job done quickly.

Reduce costs and improve operational efficiencies with DocForm. Call center coordination, accounts receivable management, and marketing automation are examples of key business processes that DocForm can improve.

DocForm has been designed to be easy to install, configure, and use. Save money with quick DocForm implementations. There is no need for reprogramming on your existing systems and infrastructure when using DocForm, which saves you even more money.

Reduce costs by modernizing your document generation system. By using DocForm you eliminate the need for pre-printed forms. Save your company the expense of purchasing pre-printed forms, forms obsolescence, pre-printed forms storage, and managing changes to pre-printed forms.

DocForm is a tool to enable your company to modernize its printing equipment. Since DocForm can print to leading printers on the market today, you can escape the constraint of being obligated to use the legacy printers you may be using today. Save money by replacing old line printers with more cost effective newer printer models. Best of all, with DocForm you can use all the finishing features available on today's modern printing devices such as stapling and duplexing.

Dynamically producing multiple outputs is a strength of DocForm. Benefit not only from printing more efficiently, but also by being able to integrate multiple systems together such as linking your financial applications to your customer service. Increasingly companies are looking for unified approaches to managing their document processes. DocForm easily handles printing and integration to workflow, storage, and web content management systems.

Document processes are made intelligent by DocForm's conditional processing. The wizards lead you through common applications. Direct access to scripting within DocForm delivers the ability to make applications customized and extensible to match even the most complex requirements.

DocForm is truly as powerful as you want it to be, making it a great fit for everyone from the typical office workers to the advanced programming users. Start today, reduce costs and modernize your document and printing systems with DocForm.

## 10. PRINTECH INCORPORATED

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### About Printech, Inc.

Printech is a total solution provider of laser check printing systems and document output software that has been operating nationally and internationally for the past 22 years. Our longevity and expertise are qualities we will employ to help you experience a successful document management installation and implementation.

Our approach is personalized to meet your objectives. Our unique ability to accommodate and satisfy your specific needs and requirements is what sets us apart from our competitors. DocForm is a robust and flexible software system that will streamline your existing document management operation providing you with increased productivity, efficiency and reduced operating costs.

For your peace of mind, we stand firmly behind our products and guarantee that our software will meet or exceed your expectations. Explore our methodology and discover how customers just like you have been delighted with the results of the DocForm document management solution.

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