

personalize | transactional | 1:1 promotional | mobile

DocForm™

*Personalized Business Documents
Dynamically Generated*

DocForm merges variable and static data and content to create powerful personalized print and electronic documents.

For all types of communications.



DocForm™

DocForm creates powerful and personalized variable content documents. It dynamically merges a wide range of static and variable data, text, content and images – from many different sources such as databases, flat files and host systems – into personalized, low cost print and electronic documents.

DocForm is intuitive and easy-to-use – allowing quick project design - yet powerful enough for demanding applications. It is highly scalable and can be used for all types of communications and documents ranging from the enterprise to desktop.

DocForm also allows data input to your documents from signature pads, Tablet PCs, third-party applications, and the web saving time while increasing efficiencies and improving workflow – no more scanning or faxing paper documents. Input signed electronic documents directly into your archiving and document management application.

Save Money • Increase Operational Efficiencies • More Powerful Communications

Replace preprinted forms with less expensive plain-paper laser-printed forms

Create your own personalized and sophisticated brochures, letters and other communications

Replace outdated line printers, dot matrix printers, bursters and collators

Eliminate outsourcing of your variable data and personalized printing jobs

Used for all types of print and electronic documents and communications.

Personalize

Reports, booklets, forms, complex letters and communications

Personalize text, messages, logos, greetings, images, and a lot more

Add charts, graphs, color, lines, boxes, bar codes, and more

Deliver documents to print, archive, web, fax, and email based on customer preference

1:1 Promotional

Targeted promotional printing and advertising, and all types of 1:1 messaging

Financial reports, newsletters, flyers, and mortgage documents

General booklet making, provider and member books

Postcards, coupons, N-up printing

Transactional

Statements, invoices, packing slips, checks, financial reports, medical forms, employee and student records

Financial and insurance documents

High speed and powerful mail merge

Reformat, repurpose and redistribute data on green-bar documents

Mobile

Apply digital signatures to leases, contracts, bills of lading and other documents

Approve or reject transactions, contracts and leases

Complete and submit forms

Reduce data entry and save time, eliminate scanning steps

Import many data types, files and sources

PCL, AFP, PDF, XML, JPG, TIFF, PNG, CSV

Database records, recordized data

iSeries, AS/400, Unix, ERP

Web posted data

Signature pads, Tablet PCs, third-party software

Designed for all print environments

Production

Workgroup

Personal

industries

Banking

Finance

Insurance

Education

Health Care and Medical

Manufacturing

Real Estate

Auto

Utility

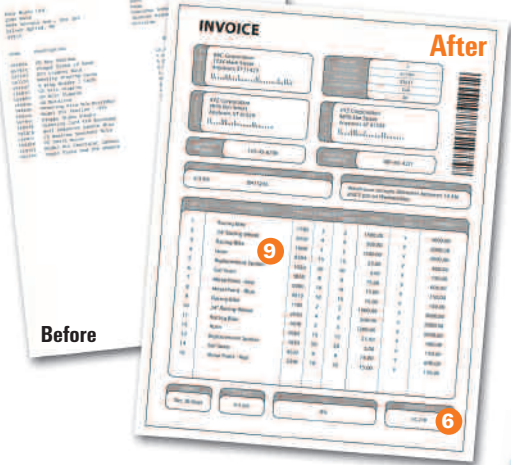
Government

Telecom

Retail

Distribution

Services



Replace expensive preprinted forms with low cost laser printed forms...

Quickly turn your expensive and out-of-date communications into powerful 1:1 documents and messages...

in black and white or color.



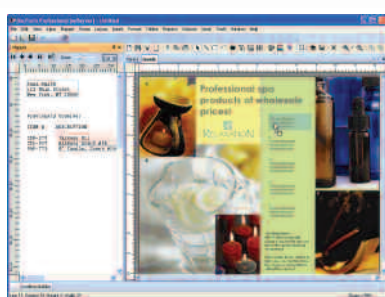
Before



After



- 1 electronic forms design and delivery
- 2 dynamic, personalized text
- 3 dynamic graphics
- 4 dynamic addressing
- 5 auto date
- 6 auto calculations
- 7 dynamic barcoding
- 8 dynamic charts & graphs
- 9 database access
- 10 dynamic finishing and paper tray selection



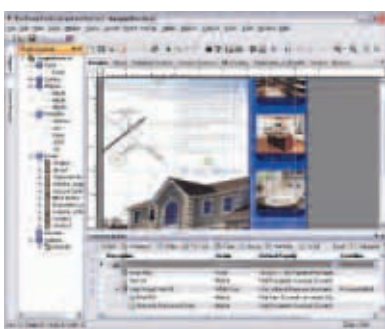
Easily Design Business Documents

DocForm has an intuitive and simple drag-and-drop interface that allows for the quick design of powerful and personalized business documents.

Customize the user interface with dockable windows and multiple views. The split screen design saves time by showing the data and template views side-by-side for easy editing.

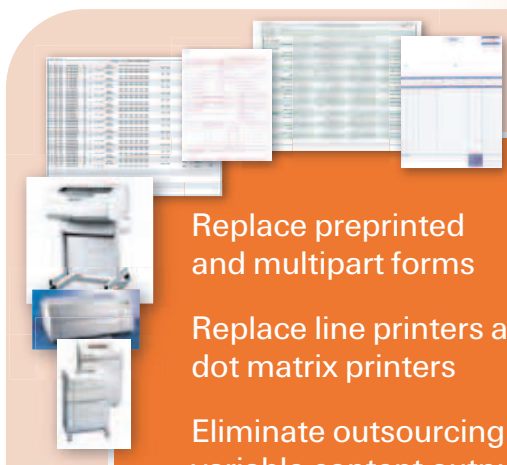
Easily add data-driven dynamic charts and barcodes.

Incorporate data from signature pads, Tablet PCs, web sites, and third-party software solutions.



Quickly Apply Conditional Rules

DocForm provides a quick-and-easy method to apply all types of conditional rules, conditional messages, output options, logical triggers, and logical expressions. Easily make database queries.



Replace preprinted and multipart forms

Replace line printers and dot matrix printers

Eliminate outsourcing of variable content output

What DocForm Does

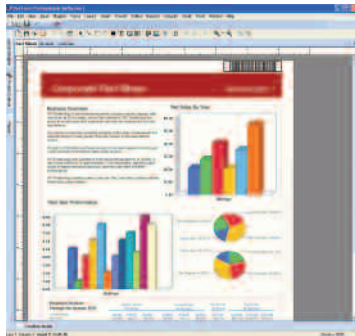
Personalize your Business Documents

The power of personalization has never been easier, or more powerful™

DocForm easily creates targeted and personalized marketing messages that produce better customer response rates and enhance customer service. Personalize text, messages, greetings, images and a lot more.

Expand your personalization program to include content captured from the Internet. DocForm provides both web submission and retrieval to add more variable content to business documents.

DocForm provides an advanced point-and-click approach to build complex documents. Save time with the expression editor to make computations and logical evaluations, the layout editor for multi-page documents, and specialized formatting functions for improved control over variable content.



Add Graphs and Barcodes

Quickly add data-driven graphs and barcodes to your projects

Transactional Documents

Advanced Transactional Document Creation™

DocForm is the powerful solution for the core of every organization's communication requirements – it's traditional or transactional document creation and printing such as statements, invoices and bills, checks, and hundreds of other documents and forms.

DocForm is ideal for a wide range of organizations wanting to –

- Easily migrate away from expensive preprinted forms to laser-printed forms
- Improve outdated printing solutions
- Accelerate document change requests without reprogramming existing host systems.

DocForm is ideal for all print environments – from production to workgroup. Run your printers at rated speed by storing static data on the printer while sending only the variable data over the network. Utilize the native Windows driver and printer finishing options for either PCL or PostScript printing.

DocForm also outputs copies of the transactional documents digitally into archive and document management systems, email, to the web, and to third-party applications.



DocForm can take data, from many different sources, and create a wide variety of documents that increase your operational efficiencies, provide more powerful communications while saving money.

Promotional Documents

DocForm – when mail merge is not enough™

DocForm is the powerful solution to easily create a wide variety of 1:1 promotional communications including postcards, mailers, flyers, coupons, notices, brochures, and much more.

Make mailers and other items more compelling, and increase customer response, by adding personalized messages, text, graphics and images, and more. Create documents with variable charts, graphs and more based on demographics and other marketing data.

Newsletters, bulletins, letters and more are easily made using DocForm's advanced word processing capabilities with rich text formatting (RTF) support, or import PDF or image files as background design templates. DocForm intelligently manages page overflow and multi-page documents as well.

Use DocForm's N-up (2-up, 4-up, etc.) printing capability to produce personalized and professional 2-sided postcards, business cards, and flyers fast. DocForm provides both print and digital personalized outputs for more effective and compelling marketing and selling campaigns.

PROMOTIONAL

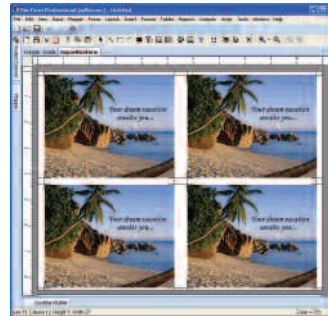
Newsletters
Real Estate Flyers
Postcards
Signs
Brochures
Banners
Coupons

DEPARTMENTS

Shipping & Receiving
Marketing
Sales
Operations
IT
Advertising

MOBILE

Contracts
Leases
Forms
Bills of Lading
Proof of Delivery
Sales Force Automation
Shipping Documents



N-up Printing
Easily configure N-up printing projects.

Mobile Information Capture

DocForm eliminates Print-Sign-Scan/Fax Problems™

Mobile and remote users can manually add critical data to electronic DocForm documents. Adding signatures, quantities and other items directly into DocForm eliminates having to print-sign-scan/fax paper documents.

DocForm is ideal for leases, bills of lading, contracts, license agreements, shipping and other documents requiring the manual addition of critical data. Add this data either through a programmable and intelligent signature pad or through a Windows®-based Tablet PC.

DocForm is ideal for mobile and remote users on the go, and for all applications presently having to print-sign-scan/fax documents. Easily and quickly improve sales force automation with DocForm.



Intelligent Signature Capture
Capture signatures and other conditional information written on a digital signature pad into DocForm forms. Apply decision rules on the signature pad such as yes/no and accept/reject.



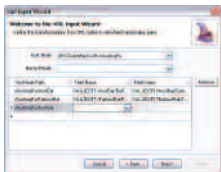
Tablet PC Forms
Complete forms, accept or reject transactions, and mark information on to DocForm forms through a Tablet PC. Dynamically load forms from the server and update information.

How DocForm Works

Data Sources and Types

DocForm accepts as input a wide variety of data types from many different sources. Input data directly into DocForm from files, print queues, LPR ports, databases, web sites and third-party applications. Input data types and sources include:

- PCL, ASCII, EBCDIC, and AFP
- ERP, CRM and Accounting applications
- XML, database records, flat files, recordized data and CSV files
- Tablet PCs and Signature Pads



XML Input

Easily capture XML input data and organize using DocForm's XML mapper. Mapping XML data to business documents is easy. Use the integrated Wizard to lead you through the steps to set up the process and edit as necessary.



Database Query Builder

Use this graphical interface to pull records from databases and merge to your business documents. Both easy to use and powerful enough for sophisticated record manipulation, the query builder unleashes the power of the data in your database.



Tablet PC Forms

Complete forms, accept signatures, and mark information on to Tablet PC forms and route back to the DocForm Server for distribution and data uploading. No more having to print-sign-scan/fax documents.

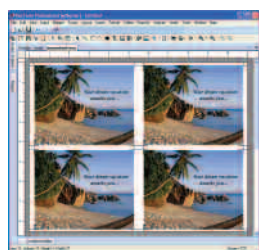


Intelligent Signature Pads

Capture and include into DocForm signatures and other data written on a digital signature pad. Apply decision rules on the signature pad such as yes/no and accept/reject.

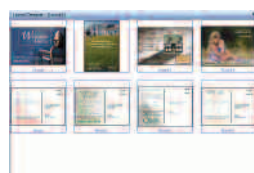
DocForm Designer

Easily create a wide variety of DocForm projects utilizing DocForm's Designer interface. Project design utilizes intuitive drag-and-drop features. Easily change fonts, drawings, text, and charts. Quickly add graphics, logos, and images. Create natively or import RTF files. Import graphic files, PDF and EPS files to use as background images/templates and overlay text and other items to customize. Map source data by dragging-and-dropping to the project with DocForm's side-by-side dockable windows. Import and auto-translate Xerox Metacode forms.



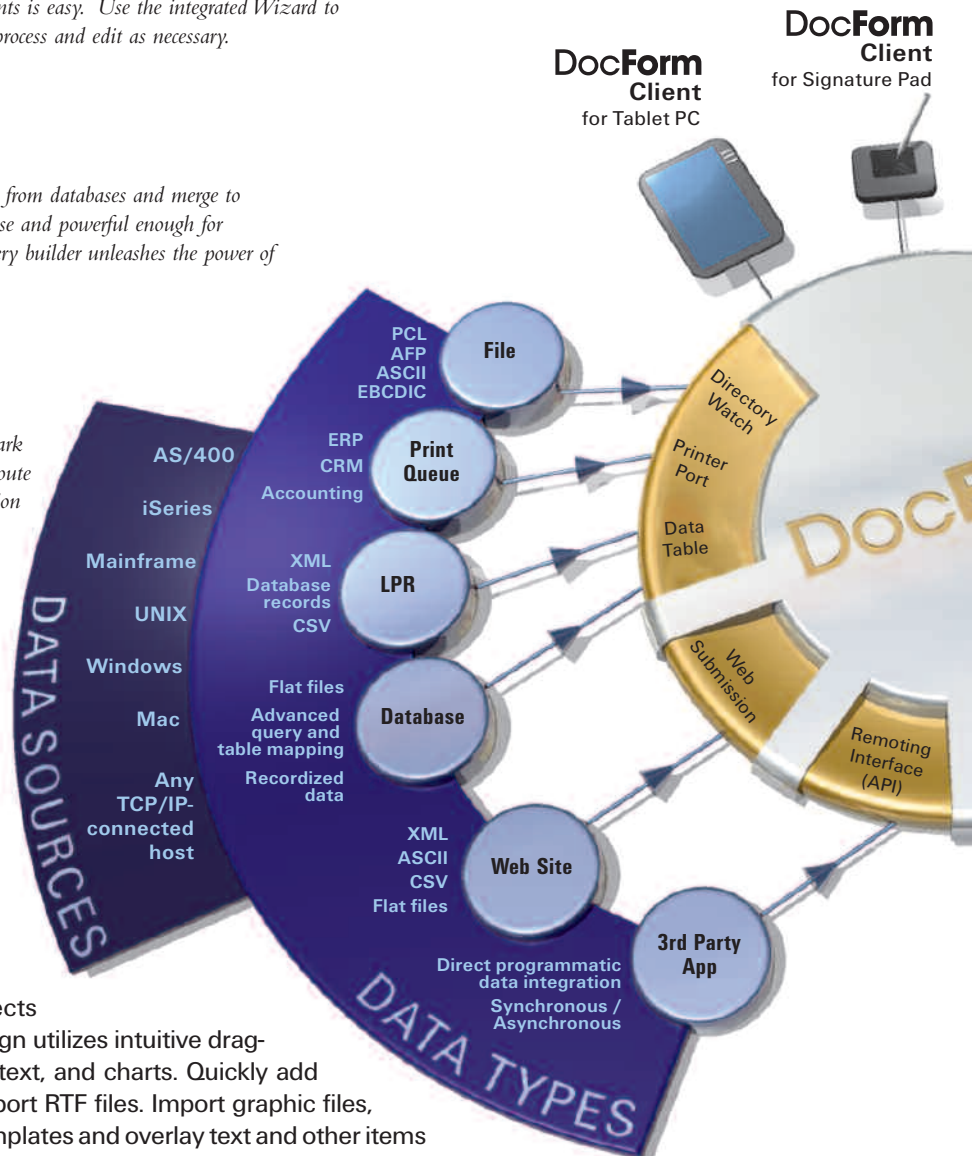
N-up Layout

Design document page layouts with N-up (2-up, 4-up, 8-up, etc.) for faster job completion and better use of resources when running postcards and coupons.



Layout Designer

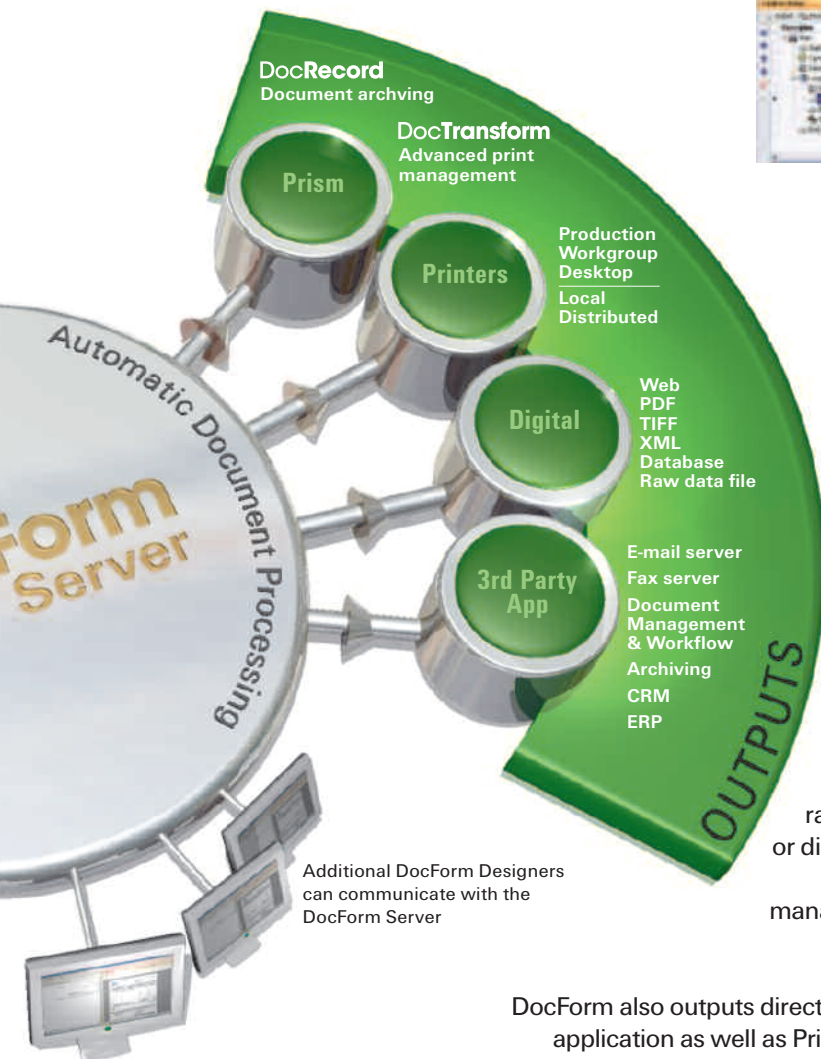
Re-sequence pages quickly with the graphical user interface and print multiple-page forms with individual printing properties.



DocForm Server

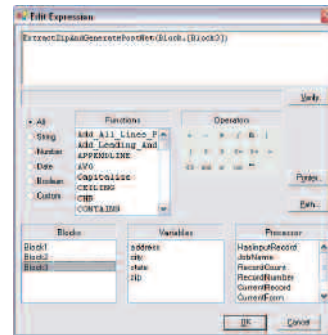
Once a DocForm project is built and the source data is mapped, increase the sophistication of the project by applying conditions, rules, and trigger conditions – use for personalizing text and messages, testing conditions, routing documents, defining outputs, and much more.

The DocForm Server dynamically processes the project upon predefined initiation triggers such as source data arrival into a directory watch, printer port watch, data table, web or Remoting Interface (API).



Condition Builder

The Condition Builder provides an easy method to generate personalized business documents dynamically. Apply targeted messages or images to achieve personalized one-to-one campaigns.



Expression Editor

Using expressions makes specific formatting and computations easy to include in new documents. Create and use specialized functions by simply following the prompts and selecting the needed data blocks, operators, and variables. Users can modify documents to meet their specific needs for variable data merging and printing.

Outputs

DocForm outputs the dynamically-merged data and project to print, electronic format and third-party applications. Print outputs range from production print to workgroup to desktop – either local or distributed. Electronic outputs include PDF, TIFF, and raw data files.

Third-party outputs include email server, fax server, document management and workflow applications, archiving applications, CRM and ERP applications.

DocForm also outputs directly into Prism's DocRecord document management and archiving application as well as Prism's DocTransform, an advanced print management application.

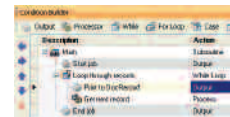
DocForm Designer

1 included with each DocForm Server



Printing

DocForm prints directly through the manufacturer's Windows® print driver with access to all finishing options such as duplexing, stapling, and booklet-making.



DocRecord

Compose documents and route them to DocRecord for archiving. DocForm extracts relevant information from the original file to streamline the indexing process in DocRecord.



Print Optimization

Optimize printer speed with form overlays run directly on the printer.



Digital Outputs

Produce TIFF and PDF files directly from DocForm. Files can also be passed through in their original raw file format.

Features & Benefits

Data Sources & Types

Database support (ODBC)	Ability to insert data into documents retrieved from databases
Text & ASCII data support	Receive and process text and ASCII data streams
CSV and flat file support	Import CSV and flat files through data tables and map data to new document templates
XML input wizard	Easily organize, edit, and map XML data to new document templates
Directory watch	Monitor and process files directed to a specific directory folder on a network
Printer port monitor	Save time by simply printing directly to DocForm from a mainframe, midrange system, or networked PC
Input filters for AFP, PCL, and ASCII data	Standardize and filter incoming non-standard print streams to prepare them to print on document templates
Custom input filters	Integrate your own customized filters to process incoming print streams to DocForm
Remoting interface (API)	Invoke DocForm from other software applications with both synchronous and asynchronous processing of data

DocForm Designer

Tablet PC forms	Complete forms on your mobile tablet PC and speed up business processes
Digital signature capture	Capture and include signatures written on a digital signature pad into DocForm templates such as forms and financial documents Save time and accelerate document processes with this integrated feature
PDF import	Easily imports PDF forms and merge data into form fields and print the result out as a new PDF. Accelerate document design and leverage existing document resources
Layout editor	Graphical tool to design multiple-page forms and re-sequence pages with individual printing properties for each page such as combining landscape and portrait orientation pages in the same document
Database query builder	Use a graphical point and click interface to submit basic and complex requests to retrieve records from databases
Data grid	View and organize database records and XML files for mapping onto new templates
Data driven barcodes	Easily map specific target areas on documents for barcodes and apply any one of the 28 leading barcodes that are included such as PostNet, Code 128, and Code 39
Data driven charts	Generate dynamic 2D & 3D pie, line, and bar charts for documents
N-up printing	Design document page layouts with N-up (2-up, 4-up, 8-up, etc.) for faster job completion and better use of resources when running postcards, coupons, and more
Metacode form import	Easily translate your existing library of Xerox Metacode forms (.frm files) into fully editable DocForm templates by using this import function
Advanced project explorer	With the improved look and feel, organizing your project design is even easier within this library of project elements. Drag and drop directly from the project explorer to save time while designing
Project variables	Reduce complexity & save time by re-using common objects within a DocForm project
Data anchor blocks	Automatically correct the irregular or inconsistent placement of incoming data to a predictable location on the page. Set data triggers to move information across a page to maintain relative positioning of key fields on document such as sub-totals and total fields
Multi-page handling	Dynamically paginate records across multiple pages and manage page overflow
Drag and drop data mapping	Quickly map data or records from your existing systems to your new document templates
Customizable windows	Design your workspace with dockable windows that auto-hide to save your time
Split screen designer	Accelerate design by viewing both the source document and new form template
Sorting	Sort incoming records before they are mapped to the new template

DocForm Server & Conditional Processing

Graphical condition builder	Design dynamic documents with the point and click ability to add conditions, rules, and trigger conditions to the way documents are composed. The Condition Builder provides a means for almost anyone to generate personalized business documents dynamically. Apply targeted messages or images to achieve personalized one-to-one campaigns.
Expression editor	Create customized functions for computations and formatting by simply following the prompts and selecting the data blocks, operators, and variables needed
Conditional properties	Apply conditions or rules to object properties from within the Project Explorer. This allows users another convenient and easy way to make their documents dynamic by changing properties such as object color, display, and location
Formatting functions	Pre-built design functions to automatically format document in certain way such as capitalize, currency, and case
Custom function library (scriptlets)	Build and reuse your own custom formatting functions within the integrated formatting function library
Scripting environment (non-proprietary)	DocForm users who prefer direct access to scripting to code custom functions can use the integrated scripting environment with non-proprietary JavaScript (JScript)

Printing and Output

PostScript & PCL support	DocForm can print through standard print drivers both in PostScript & PCL formats
Form overlays on printer	Optimize printer speed with form overlays run directly on the printer
TIFF output	Produce with TIFF documents with settings for multi-page, compression, and resolution
PDF output	Produce PDF digital files (Adobe Distiller required)
Post-process files	Ability to run an external program after DocForm has processed the files for customized finishing requirements or other post-processing needs
Custom print media	For high-volume and complex printing environments, set custom paper sizes, weight, and color beyond what is directly available on the print driver
Interpret PostScript DSC commands	Enhanced control over document structure with the ability to dynamically insert EPS files into jobs
Fax and email output	Ability to produce digital files that can be routed to fax and email servers. Email output now has direct integration with the Expression Editor for more dynamic messaging
Web output	Dynamically post files to websites

Security and Administration

DocForm service	Automatically process jobs without the need to manually release jobs or compile projects
Password protection	Secure and manage access to DocForm projects with passwords
Server log and console	Track, analyze, and troubleshoot DocForm processing
Email alerts	Set email notification to alert administrator during document processing

System Requirements

DocForm	Windows® 2000 (SP6+)/XP/2003; Intel Pentium® IV 2GHz or greater; 256 MB of RAM (512 MB Recommended) ; SVGA+, 17 inch; CD-ROM; 10/100 Mbps network card; Keyboard; Mouse	DocForm Signature Client for Signature Pad	Interlink Electronics, ePad LCD pad, USB version
		DocForm Signature Client for Tablet PC	Microsoft XP Tablet PC Edition 2005



Prism Software Corporation : 15500-C Rockfield Blvd. : Irvine, CA 92618 : 949-855-3100 : 949-855-6341 fax : www.prism-software.com

©2005 Prism Software Corporation. All rights reserved. DocForm, DocRecord, and DocTransform are registered trademarks of Prism Software Corporation in the United States and/or other countries. All other names, logos or marks mentioned or used herein may be the trademarks or service marks of their respective owners.