

personalize | transactional | 1:1 promotional | local & remote

# DocForm™

*Personalized Business Documents  
Dynamically Generated*

**Promotional & Transactional Print Documents**

**Variable Data Printing**

**Web Forms & eForms**

**eDocuments & eContracts**

**Signature Pads & Tablet PCs**

**Remote Data Addition**

**Enterprise Variable Data**

**Integrated Postal Certification**





industries

- Banking
- Mortgage
- Insurance
- Education
- Retail
- Health Care and Medical
- Transportation
- Manufacturing
- Real Estate
- Auto
- Utility
- Government
- Telecom
- Distribution
- Services

**DocForm creates all types of personalized promotional and transactional print and electronic documents – *locally, remotely, and over the Web.***

DocForm creates powerful and personalized variable content documents. It is designed for print documents and eDocuments of all types – from workgroup to production.

DocForm is intuitive – allowing quick project design and implementation – yet scalable and powerful enough for demanding enterprise applications.

In addition to creating print documents, DocForm can also create collaborative and personalized electronic documents – such as eForms, eContracts, and other eDocuments. Create these at either a headquarters or at a remote office, apply signatures, and automatically and electronically route them to other locations – even auto-archive them to a document management system. It’s also easy, through customer fill-in screens, to automatically create a wide range of supporting documents.

DocForm dynamically merges a wide range of variable and static data such as names, addresses, text, photos, logos, images, messages, discount coupons, charts and graphs, barcodes, calculations, Web links, and more. It can simultaneously merge data from multiple sources such as databases, flat files, print streams, data streams, ERP and CRM programs, XML, the Web, third-party applications, and much more.

DocForm also allows data input to all your documents from many sources, including signature pads, Tablet PCs, remote PCs, XML, third-party applications, and the Web.

DocForm is the single application your organization requires for your variable data print and eDocument applications.

**Transactional**

- Statements and Invoices
- Checks
- Personalized Letters
- Credit Notices
- Licenses
- Insurance Claims and Notices
- Booklets and Reports

**Web Forms**

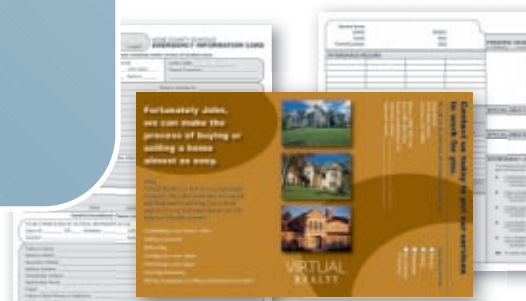
- Contracts
- Human Resource Forms
- Corporate Forms
- Expense Reports
- Insurance Questionnaires
- Medical and Dental Forms and Applications
- Repair and Service Orders

**Promotional**

- Advertising and Brochures
- Mailers and Flyers
- Letters and Correspondences
- Literature and Newsletters
- Booklets and Reports
- Coupons and Postcards
- Certificates and Tickets

**eForms, eDocuments, and eContracts**

- Bills of Lading
- Purchase and Lease Agreements
- Mortgages
- Contracts
- Proof of Delivery
- Sales Force Automation
- Shipping Documents



# Personalization - in black and white or color.

- 1 Text
- 2 Graphics
- 3 Photographs
- 4 Logos
- 5 Addresses
- 6 Dates
- 7 Calculations
- 8 General and address barcodes
- 9 Charts and graphs
- 10 Finishing options and paper tray selection



## Print Effective and Personalized Promotional and Transactional Documents

DocForm is commonly used to produce all types of variable data promotional and transactional print documents. In addition to printing your personalized documents, DocForm will electronically output everywhere and every way you need it – archiving, XML, email server, the Web, fax server, CRM and ERP systems, other third-party applications, and more. DocForm also works seamlessly with other Prism Software applications such as DocRecord, DocSystem, and DocTransform.



## 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.

Easily add data-driven charts and barcodes. Personalize with variable images, content, graphics, and other content.

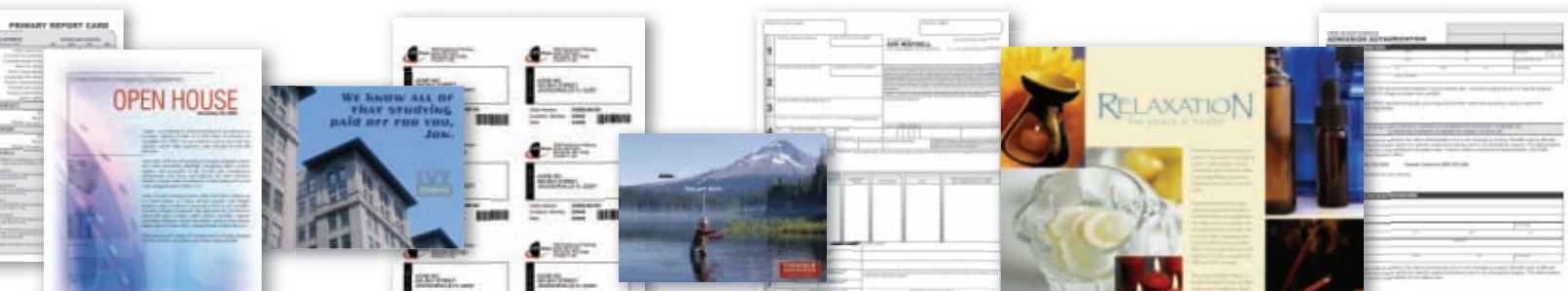
Incorporate data from signature pads, Tablet PCs, Web sites, remote data entry, fill-in screens, third-party software solutions, and more.

## Easily Design Workflow Rules

DocForm's integrated Workflow Designer provides an easy and powerful method of applying workflow rules to the documents you design. You can both create and route documents based upon a wide variety of conditional rules, tests, and messages in addition to output options, logical triggers, logical expressions, and more.

## Integrated Postal Certification

Make your mailings even more effective by using DocForm's fully integrated Postal Certification module. This module will allow you to easily add address verification and postal sorting to your mailings. Specifically, you can perform ZIP+4® checks, PAVE™-certified pre-sorts, CASS™ capabilities, and more.



## Data Sources and Types

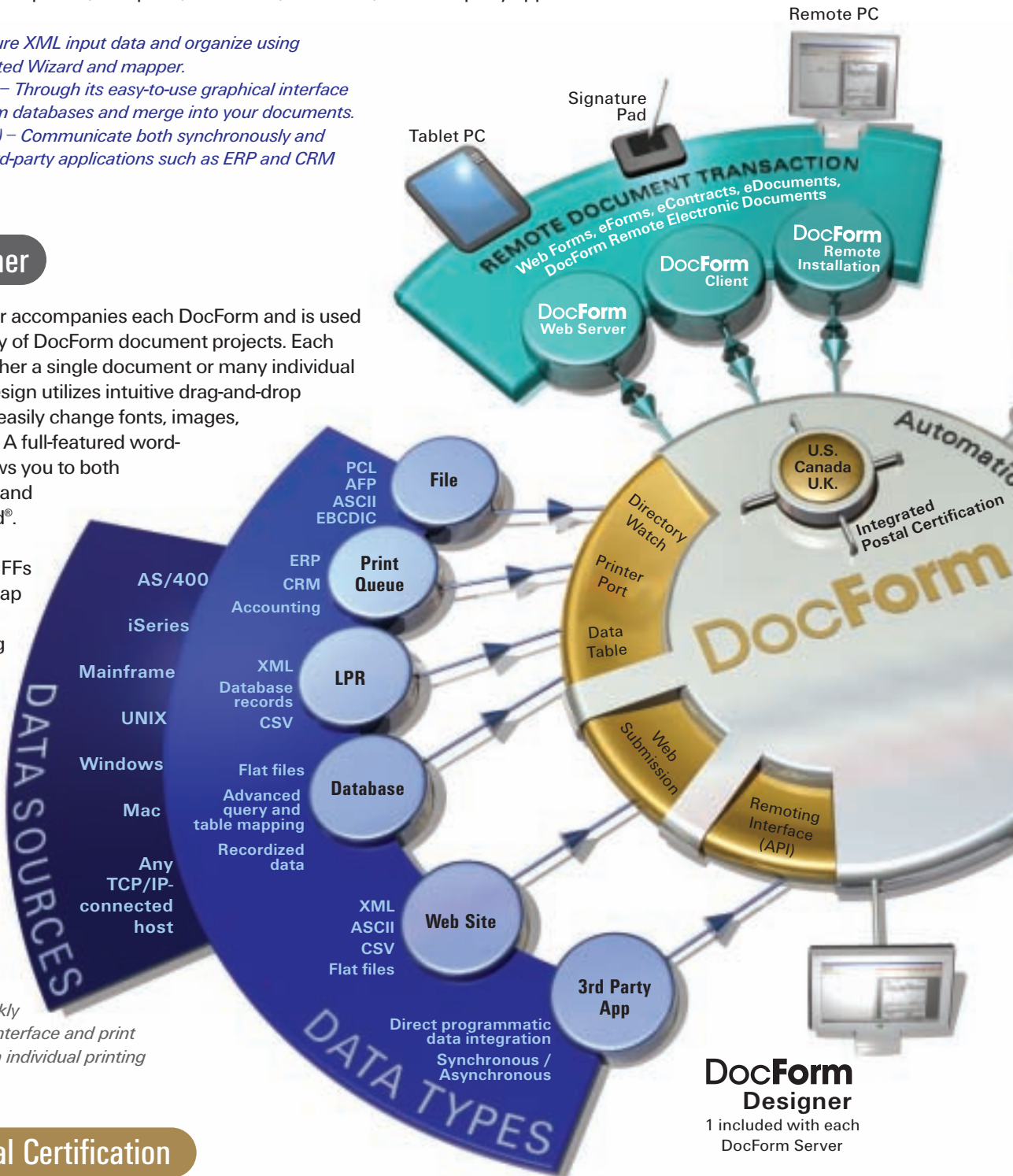
DocForm accepts as input a wide variety of data types from many different sources. Simultaneously input data directly into DocForm from files, print queues, LPR ports, databases, Web sites, and third-party applications.

- > *XML Input – Easily capture XML input data and organize using DocForm’s XML integrated Wizard and mapper.*
- > *Database Query Builder – Through its easy-to-use graphical interface you can pull records from databases and merge into your documents.*
- > *Remoting Interface (API) – Communicate both synchronously and asynchronously with third-party applications such as ERP and CRM systems.*

## DocForm Designer

The DocForm Designer accompanies each DocForm and is used to create a wide variety of DocForm document projects. Each project can contain either a single document or many individual documents. Project design utilizes intuitive drag-and-drop features, and you can easily change fonts, images, text, charts, and more. A full-featured word-processing editor allows you to both create native RTF files and import/edit from Word®. Import PDFs, EPS, and graphic files such as TIFFs into a project. Easily map source data by dragging-and dropping to the project. Import and auto-translate Xerox Metacode forms.

- > *N-up Layout – Allows you to design document page layouts with N-up (2-up, 4-up, 8-up, etc.) for faster job completion – used for postcards, coupons, etc.*
- > *Layout Designer – Re-sequence pages quickly with the graphical user interface and print multiple-page forms with individual printing properties.*



**DocForm Designer**  
 1 included with each DocForm Server

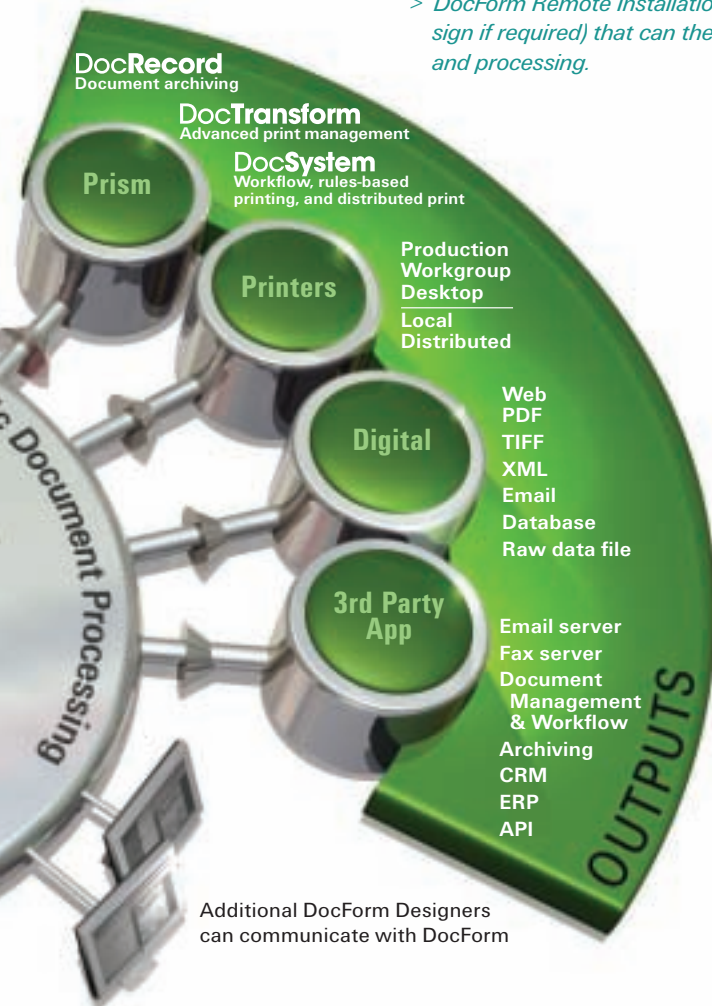
## Integrated Postal Certification

Postal Certification Module – Make your mailings more effective and lower cost by using the fully integrated Postal Certification Module for the U.S., U.K., and Canada. This module will allow you to easily add address verification and postal sorting to your mailings. Specifically, with the U.S. module, you can perform ZIP+4® checks, PAVE™-certified pre-sorts, CASS™ capabilities, and more.

## Remote Document Transaction

Send PDF documents to remote locations – or display over the Web – to apply signatures, data addition, and mark-up. Or, you can generate a PDF through a remote (such as a field office or field sales person) installation of DocForm and send it to another DocForm at HQ for more data addition, processing, and routing. Marking up remote documents is easy with a Tablet PC, signature pad, or remote PC.

- > *DocForm Web Server – Is used to send documents over the Internet to a DocForm Client or display documents on the Web. These documents can then be signed, marked up, and routed back into DocForm for further processing.*
- > *DocForm Client – Is used to mark up and sign remote documents sent to it by DocForm.*
- > *DocForm Remote Installation – Is a full-featured DocForm and can be used to remotely originate a document (and sign if required) that can then be sent to a master DocForm (such as at a corporate HQ) for further data addition and processing.*



## DocForm Server

Once a DocForm project is built, and the source data is mapped, you can apply workflow and printing rules, and trigger and output conditions. These are used for personalizing text and messages, testing conditions, routing documents, defining outputs, and much more. DocForm projects can be automatically initiated upon predefined triggers such as source data arrival through a variety of methods.

- > *Workflow Designer – Easily and intuitively apply a wide variety of logic tests, output methods, routing rules, workflow rules, and other items to DocForm project documents.*
- > *Image Management – Load variable images directly to the printer to speed print output and decrease the print file size on the network.*
- > *Reprint Manager – Recall print jobs for total or selected page reprint.*
- > *Advanced RTF Import and Edit Capabilities – Import RTF files and edit with DocForm’s robust word processing functions.*
- > *PDF Form Fill – Allow remote and Web users to fill in fields on the DocForm-generated PDF.*
- > *Expression Editor – Easily create and use specialized functions (such as formatting and computations) by simply following the prompts and selecting the needed data blocks, operators, and variables.*
- > *Print Optimization – Optimize printer speed with form overlays run directly on the printer. Send only the variable data to the printer.*

## Outputs

DocForm outputs the dynamically-merged data and document project to print, electronic format, third-party applications, and other Prism Software applications.

- > *Print Outputs – Range from production print to workgroup to desktop – either local or distributed – and color or mono. DocForm prints directly through the manufacturer’s Windows® print driver with access to all finishing options such as duplexing, stapling, and booklet making. Print to both PCL and Postscript-based printers.*
- > *Digital Outputs – Include Web, PDF, TIFF, XML, databases, and raw data files.*
- > *Third-party Outputs – Include email server, fax server, workflow applications, archiving and document management applications, and ERP and CRM applications.*
- > *Archiving – DocForm also sends the indexing fields and metadata, along with a PDF or TIFF, to the archiving application for automated filing.*
- > *Prism Software Products – Also output to Prism’s DocRecord, DocSystem, and DocTransform for additional and advanced document archiving, departmental workflow, rules-based printing, and print management capabilities.*

DocForm has more power and easy-to-use features than other variable data solutions. These features allow you to create personalized print and electronic output projects faster, with more capabilities and options, and with the most flexibility.

## Fully Integrated Postal Certification Module

Save money on your mailings with the fully integrated Postal Certification module. It allows quick and seamless address sorting, verification, change of address data updates, and more for the U.S., Canada and U.K.

The basic postal module for the U.S. includes

- **ZIP + 4<sup>®</sup>** capability adds the correct nine-digit ZIP Code, will automatically fill in city and state data based upon ZIP Code entry, and standardize address data using USPS-preferred spellings and abbreviations.
- **CASS<sup>™</sup>** (Coding Accuracy Support System) certified control capability qualifies your fixed-weight mail for the lowest postal rates by cleaning and processing an entire batch of addresses, printing the USPS Form 3553, and more.
- **PAVE<sup>™</sup>** (Presort Accuracy, Validation and Evaluation) certified mailing capability qualifies your mixed and fixed weight postal items such as First-Class Mail<sup>®</sup>, Standard Mail<sup>®</sup>, and periodical mailings for the lowest possible postal rates.

Additional U.S. modules include: NCOALink<sup>™</sup> (National Change of Address), DPV<sup>™</sup> (Delivery Point Validation), and Geocoding. Please see separate DocForm Postal Certification literature for more details.

### Benefits of Integrated Postal Certification

- Increases address accuracy
- Streamlines postal preparation
- Reduces returned mail & packages
- Saves on address correction fees
- Qualifies your mailings for presort discounts
- Prints barcoded address labels plus tray tags
- Integrated solution allows native functionality without the hassle of importing/exporting data

## Licensed by Server, not by Printer

DocForm licenses its application by the server and not by the number and speed of printers to which it will be printing. This not only saves you money but also allows you to switch printers. And, a server-based application gives you more features and options.

## Utilizes Printer Manufacturer's Native Microsoft Windows Print Drivers

DocForm allows you full access to all your printer's features by utilizing the manufacturer's native Windows print driver.

## Integrated Single Product

Many other VDP (variable data printing) applications modularize their products making important features separate and costly. DocForm is a fully integrated product with all of its features included in the base product.

## Accepts Signatures and Data from Signature Pads and Tablet PCs

Add signatures and remote data to electronic forms and documents produced by DocForm. Eliminate print-sign-scan-archive inefficiencies associated with signing paper documents.

## Prints to both PCL and Postscript Printers

Most users have both PCL and Postscript printers to which they need to print. DocForm uses the native Windows print drivers to print to both.

## Integrated Workflow Designer

Design advanced workflow processes within your DocForm project with the integrated and full-featured Workflow Designer. Apply print and routing rules, perform data tests, test for conditions, and much more.

## Advanced Reprint Manager

When you need to rerun a print job, DocForm's Reprint Manager allows you to easily reprint either the whole job or selective pages.

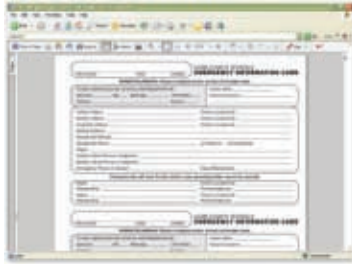
## Advanced Image-Management Interface

Place large image and graphic files directly into the printer's hard drive and call them as needed from within the DocForm project as it is printing.

## Import Microsoft Word Documents

Create newsletters, customer letters, and other correspondences in Microsoft Word and import into DocForm as a formatted RTF file.

DocForm has advanced features that allow you to construct enterprise-class variable data projects for eForms and eDocuments, Web forms, and kiosking. Additionally, you can construct projects that allow one DocForm server to collaborate with another DocForm server.



## eForms and eDocuments

DocForm can create electronic forms and documents (eForms and eDocuments) that can be electronically routed to others for processing. These electronic documents can be further amended with additional data and signatures or processed as they are.

The benefits of eForms and eDocuments are that they are efficient, quick, and contribute to effective and improved workflows. Additionally, the data within the document can be extracted and sent to ERP and CRM systems and the completed document can be easily archived, with extracted indexing information, into a document management solution.



## Web Forms

DocForm, through its optional Web Server module, can display eForms through an Internet browser on the Web. These Web forms can be viewed, have data added to them, and signed over the Internet by an end user.

Once the Web form is completed it is routed back to DocForm for further processing. DocForm then creates the additionally required electronic forms in the project and routes these to other departments, to archiving, and to print. DocForm will also extract selected data and send it to ERP and CRM applications, and write data back into selected databases.



## User Fill-in Screen Generates Multiple Documents

Many electronic and print documents are often generated from a common data source. DocForm can collect this common data, and then create and automatically route these supporting documents. An example is a patient admissions package at a hospital.

In this application, a user (patient) enters his/her data into an electronic form. This form is generated by DocForm and can be displayed either locally on a PC or kiosk, or displayed over the Web through a Web browser. The entered data can then be used to generate an admissions form, doctor's instructions, pharmacy instructions, and much more.



## DocForm-to-DocForm

Often an enterprise variable data document is iterative and the result of multiple automatic and manual data entries from different locations. An example of this is a loan or lease application that might be generated in a remote sales office. DocForm at the remote office would be used to originate a loan proposal with the applicant's name and other information.

Once originated, it is then sent to the corporate office for further processing and final approval. DocForm can then generate all the supporting documents within a loan application and reroute it back to the field office for final signatures. Once signed, it is again routed back to corporate for additional processing and archiving into its document management application.

Open the flap to get more detailed information on DocForm Enterprise's variable data capabilities...

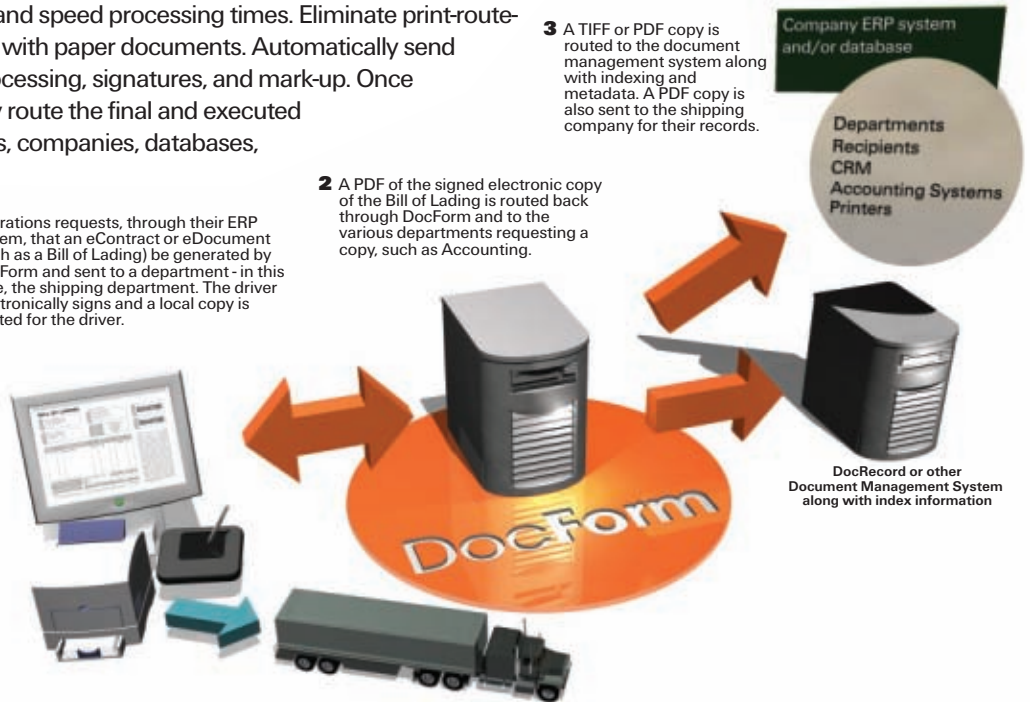
## eForms and eDocuments

By keeping your documents electronic as much as possible throughout the workflow process you can save money, increase efficiencies, and speed processing times. Eliminate print-route-sign-scan-and-archive problems associated with paper documents. Automatically send your electronic documents to others for processing, signatures, and mark-up. Once completed, automatically and electronically route the final and executed document to other departments, individuals, companies, databases, ERP systems, and archive systems. You can route either over the network or Web.

**1** Operations requests, through their ERP system, that an eContract or eDocument (such as a Bill of Lading) be generated by DocForm and sent to a department - in this case, the shipping department. The driver electronically signs and a local copy is printed for the driver.

**2** A PDF of the signed electronic copy of the Bill of Lading is routed back through DocForm and to the various departments requesting a copy, such as Accounting.

**3** A TIFF or PDF copy is routed to the document management system along with indexing and metadata. A PDF copy is also sent to the shipping company for their records.

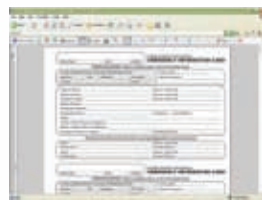


### Common Remote Applications

- > Bills of lading
- > Delivery receipts
- > Employee forms
- > Shipping and receiving documents
- > Service transactions
- > eContracts

## Web Forms

Present your forms, agreements, and contracts over the Web for signatures, data addition, and mark-up by customers, employees, and others. Reduce costs, shorten processing times, and increase efficiencies by allowing electronic processing of routine forms. Once complete, automatically and electronically route the final and executed document to other departments, individuals, companies, databases, ERP systems, and archive systems. You can route the completed document either over the network or Web.



DocForm, through the Internet and DocForm's Web Server module, lets end users retrieve, view, input data, sign, complete, download, and/or print form templates.

The completed form is automatically routed, via DocForm, to various destinations both within and outside the organization. Additionally, selected data from the form can also be parsed and sent to databases and ERP systems.



### Common Web eForm Applications

- > HR forms
- > Customer contracts
- > Service agreements
- > Customer enrollment forms
- > Operations forms
- > Reporting forms

## User Fill-in Screen Generates Multiple Documents

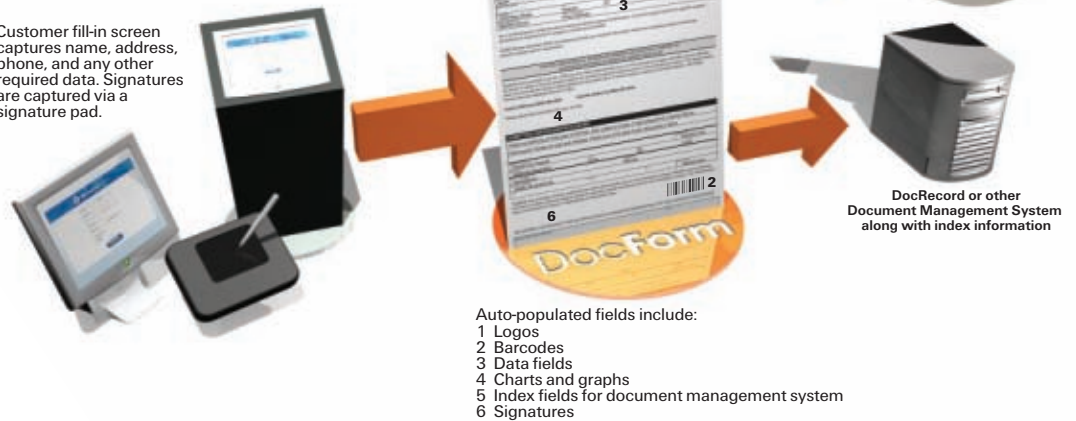
Use DocForm to create a fill-in screen on a PC or kiosk to capture walk-up or Web-based customer or patient information that will in turn automatically create and populate other forms and records. Use the fill-in capability to initiate workflow documents or sets of related documents and automatically route to departments and others.

A customer or patient can also add his/her electronic signature to accept terms and conditions, an agreement, or other item. And, each fill-in item can also become an indexing field when the various documents are electronically archived.

**1** Customer fill-in screen captures name, address, phone, and any other required data. Signatures are captured via a signature pad.

**2** Entered data automatically  
> Triggers forms creation, and  
> Populates required form and document fields

**3** The completed document is automatically routed, via DocForm, to various destinations.



### Common Fill-in Screen Applications

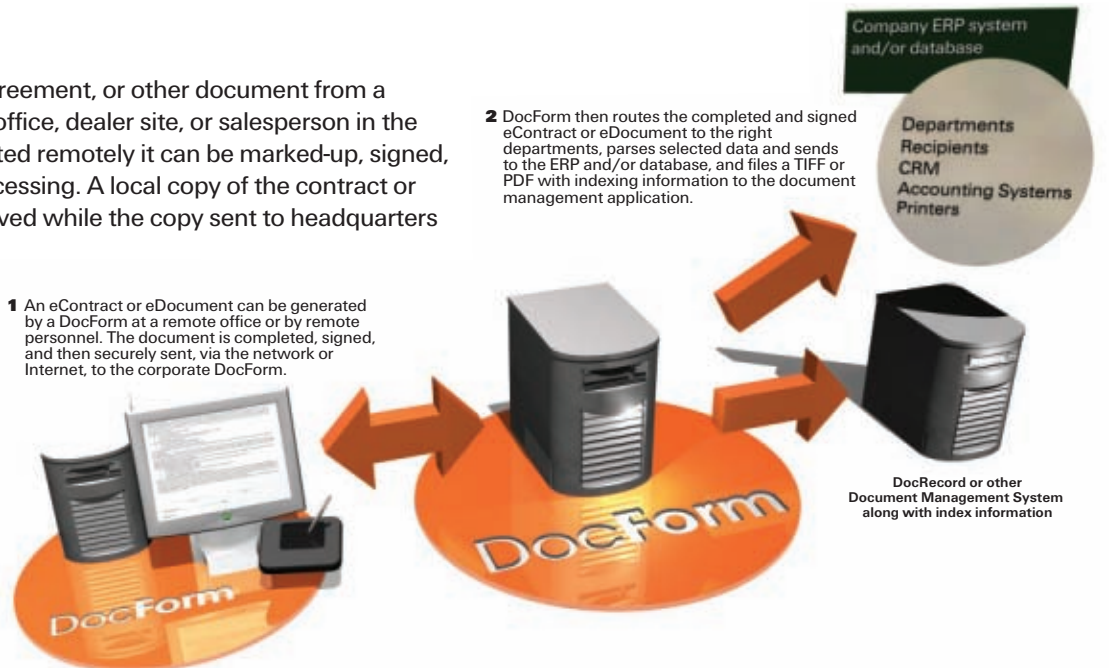
- > Patient record fill-in
- > Admission records
- > Waiting room data entry
- > Remote data entry
- > Reservations
- > Information and product requests

## DocForm to DocForm

Originate an electronic contract, agreement, or other document from a remote location such as an off-site office, dealer site, or salesperson in the field. Once the document is generated remotely it can be marked-up, signed, and routed to headquarters for processing. A local copy of the contract or document can be printed and archived while the copy sent to headquarters can be automatically and electronically routed to other departments, individuals, companies, databases, ERP systems, and archive systems. You can route the completed document either over the network or Web. You can also generate the eContract at HQ, send it to a remote sales office or location, add more data and signatures, and then electronically route the finished eContract back to HQ.

**1** An eContract or eDocument can be generated by a DocForm at a remote office or by remote personnel. The document is completed, signed, and then securely sent, via the network or Internet, to the corporate DocForm.

**2** DocForm then routes the completed and signed eContract or eDocument to the right departments, parses selected data and sends to the ERP and/or database, and files a TIFF or PDF with indexing information to the document management application.



### Common eContract Applications

- > Contracts originated by remote sales offices, dealers, or agents
- > Sales force automation for remote sales persons
- > Insurance applications and contracts
- > eMortgage applications and loan documents
- > Service contracts
- > Lease agreements

## DocForm Configurations

<b>DocForm</b>	Comprised of a DocForm application and one (1) DocForm Designer; allows for the creation, printing, and electronic distribution of variable data documents; allows up to 5 DocForm Clients; and Windows PC server-based with unlimited printer outputs.
<b>DocForm Enterprise</b>	Comprised of a DocForm application and one (1) DocForm Designer; allows for the creation, printing, and electronic distribution of variable data documents; allows greater than 5 DocForm Clients; and Windows PC server-based with unlimited printer outputs. DocForm Enterprise is required for the DocForm Web Server; and DocForm Enterprise may be required for larger variable data applications.
<b>DocForm Designer</b>	Additional Designers can be used to allow others to remotely design document projects; and Windows PC server-based (sold separately and requires either DocForm or DocForm Enterprise).
<b>DocForm Web Server</b>	Comprised of a DocForm Web-based application; allows the presentment of Web-based DocForm-generated eForms; allows DocForm Clients to interact with DocForm generated eForms and eDocuments presented over the Web through DocForm Web Server; and Windows PC server-based (sold separately and requires DocForm Enterprise).
<b>DocForm Client</b>	Comprised of a DocForm Client application; installed on a remote or client PC; allows for the physical signing of a DocForm-generated eForm or eDocument with either a signature pad or Tablet PC; works with eForms or eDocuments presented directly by DocForm or DocForm Enterprise, or those presented by the DocForm Web Server; and Windows PC based (sold separately and requires either DocForm or DocForm Enterprise; and signature pad and/or Tablet PC sold separately).
<b>DocForm Postal Certification Module</b>	Allows you to easily add address verification and postal sorting to your mailings. Specifically, you can perform ZIP+4® checks, PAVE™ certified pre-sorts, CASS™ capabilities, and more (sold separately and requires either DocForm or DocForm Enterprise).

## Other Prism Software Products

Prism's document and print software suite provides a one-stop shop for most of an organization's requirements. All of Prism's products are designed to be fully integrated with each other to provide, when combined, a seamless enterprise-capable solution. And all applications utilize an API (application programming interface) allowing them to easily exchange data and commands between third-party software applications.

### DocRecord

Is a powerful, low-cost, and easy-to-use document archiving application. Store your completed electronic documents and retrieve on demand either locally or through the Web. DocRecord, based on Microsoft SQL Server, is highly scalable for all organizations. Automatically or manually scan, enact full-page or zonal OCR, file, index, and retrieve all your documents. Conduct instant document searches with keyword look up. Batch scan and automatically file documents with barcoded sheet separators. DocRecord provides market-leading value and performance.

### DocSystem

Is a powerful, low cost, rules-based distributed print and departmental workflow application. Route both your print and electronic files based on the unique requirements of your organization. You can route print jobs based on size, color, time, department, printer status, and many other parameters. And, route your electronic documents for approval and annotation, signature, archive to the Web or other destinations, and more. Intuitively and quickly build complex workflow projects based on your organization's or customer's requirements.

### DocTransform

Enables, fixes, configures, transforms, and adapts print and data streams from any host or application for printing and archiving. DocTransform is an important application that allows your files to print correctly on a new printer or MFP device.

Most commonly used to convert data center legacy print streams, enact custom print requirements, and get documents to print correctly. Also convert common file types such as Metacode, ASCII, PCL, PDF, Postscript, IPDS, and AFP. DocTransform is often used to enable printing from back-office software applications and host systems without costly reprogramming. DocTransform is built upon an advanced print management engine that monitors printer and MFP operations and provides real-time client notification of job status.

## Features and Specifications

Please refer to DocForm's current Features and Specifications documentation. Features and specifications subject to change without notice.

## System Requirements

Windows 2000/XP; Intel Pentium IV 2 GHz or greater; 1 GB RAM or greater; 200 MB of free hard disk space on the primary partition; 12x CD-ROM or greater.

## Find Out More

Email us at [sales@prism-software.com](mailto:sales@prism-software.com) or talk to your sales representative to get additional information about what DocForm can do to improve your business. Or, visit our website, [www.prism-software.com](http://www.prism-software.com), to get more information.



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