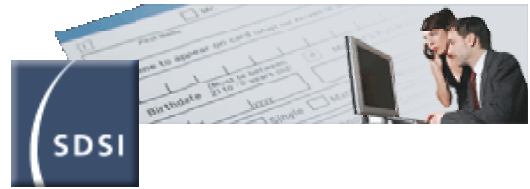


# Efficiency Opportunities with a Document Management Solution

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# Efficiency opportunities with a document management solution



Document management systems open up the opportunity for organizations of all sizes to increase efficiency. Paper-intensive organizations face what are often hidden costs associated with the time it takes to work with paper files.

The particular ways in which efficiency can be increased, and to what extent, can depend upon various factors, some or many of which are unique to each individual organization, or to the particular industry in which the organization operates.

**Finding ways to reduce or eliminate the handling of paper introduces efficiency and helps streamline processes, resulting in lower costs**

If the organization is growing, then it can become difficult to leverage the economic benefits of growth when staffing costs are variable or directly proportional to size, rather than fixed or growing on a gentler sloping curve. Finding ways to reduce or eliminate the handling of paper introduces efficiency and helps streamline processes, resulting in lower costs.

The addition of several other factors can begin to make the argument very compelling for including a document management solution on the short-list of strategic I.T. initiatives for your organization: the potential cost savings from freeing up additional office or warehouse space, the enhanced security possible with encrypted electronic files and password protection, and the benefits that electronic archives present in a disaster recovery scenario.

The evolution of a software package like SDSI's **UnForm**<sup>®</sup>, from a laser forms enhancement tool to a comprehensive document production, delivery and management solution, closely parallels the evolution of technology over the last decade. This evolution saw the growth in the availability of low-cost laser printers, the advent and subsequent popularity of electronic faxing tools, and then the pervasiveness of the portable document format (PDF) for the internet-fueled electronic mail revolution.

**A software tool built around the idea of capturing, analyzing, enhancing, and routing text streams from an organization's mainstream applications, is in a unique position to close the loop by adding archival storage and retrieval features for a fraction of the cost of implementing a standalone solution.**

A software tool built around the idea of capturing, analyzing, enhancing, and routing text streams from an organization's mainstream applications is in a unique position to "close the loop" by adding archival storage and retrieval features for a fraction of the cost of implementing a standalone solution.

In the efficiency equation which governs most economic activity, either the relative reduction of a cost input or the relative increase of a productivity output, or some optimal combination of both, results in increased efficiency. Besides quantifying the specific operational benefits to be gained from moving to an electronic document management solution, the investment and maintenance cost of the enabling-solution itself is an integral part of the equation.

SDSI's **UnForm** document management solution, with its low price-to-features ratio and its new full-document-cycle functionality, can efficiently integrate with your mainstream application to capture, enhance, deliver, and archive documents in a single operation. It is a solution worth considering if your organization can benefit from incorporating new operational efficiencies into its document-oriented processes. It is a software tool that has, and will continue, to evolve with technology and with the needs of its users.

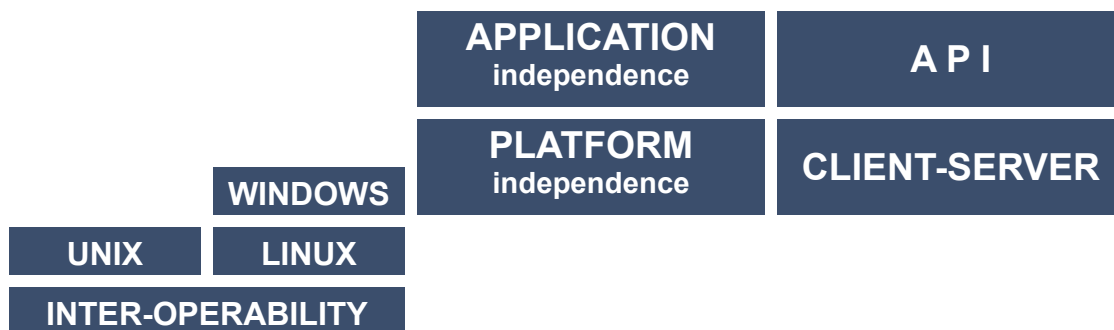
It is quite certain that opportunities for improving organizational and process efficiency will continue to present themselves as technology, and the tools which harness and capture it, move forward.

## ... Technology Statement

Technology mushrooms. **Platform independence** ensures choices, options, flexibility. Distinct operating systems may do different things better or worse than others. Servers. Workstations. Peripherals. Devices. Drivers. Configuration settings. To the extent components can remain unbound from other components and, at the same time, be tightly and flawlessly configured to communicate with them, is the extent to which independent systems reach that highest form of efficiency known as “**synergy**”.



**Integrators and developers configure independent software components to work together seamlessly to achieve desired results**



**Client-Server** is a software architecture model. It's the paradigm of separating all operating components of a system into two major logical processes. The process of building and issuing requests (the client), and the process of fulfilling them (the server). The client, being the requestor, often receives back the server output and acts on it. It is a model that is a logical outgrowth of the desire for platform-independence, in the sense that platform **inter-operability** then becomes achievable within a single network. **API** stands for Application Program Interface, and it is the language provided by a software component by which other components can interface with it. **Application Independence**, the quality by which a software component can function with another application without being an embedded part of it, is enabled by the use of API's which allow components to communicate with each other.

Basic technology choices are the focus and foundation for long-term I.T. strategies, just as they drive the technology offerings of software providers. Basing software procurement decisions in large part on underlying technology foundations is how savvy organizations plan for the long-term future and maximize the useful life of technology investments.

# UnForm

## Platform-Independent, Client-Server Document Management Solution

For UNIX, Linux and Windows



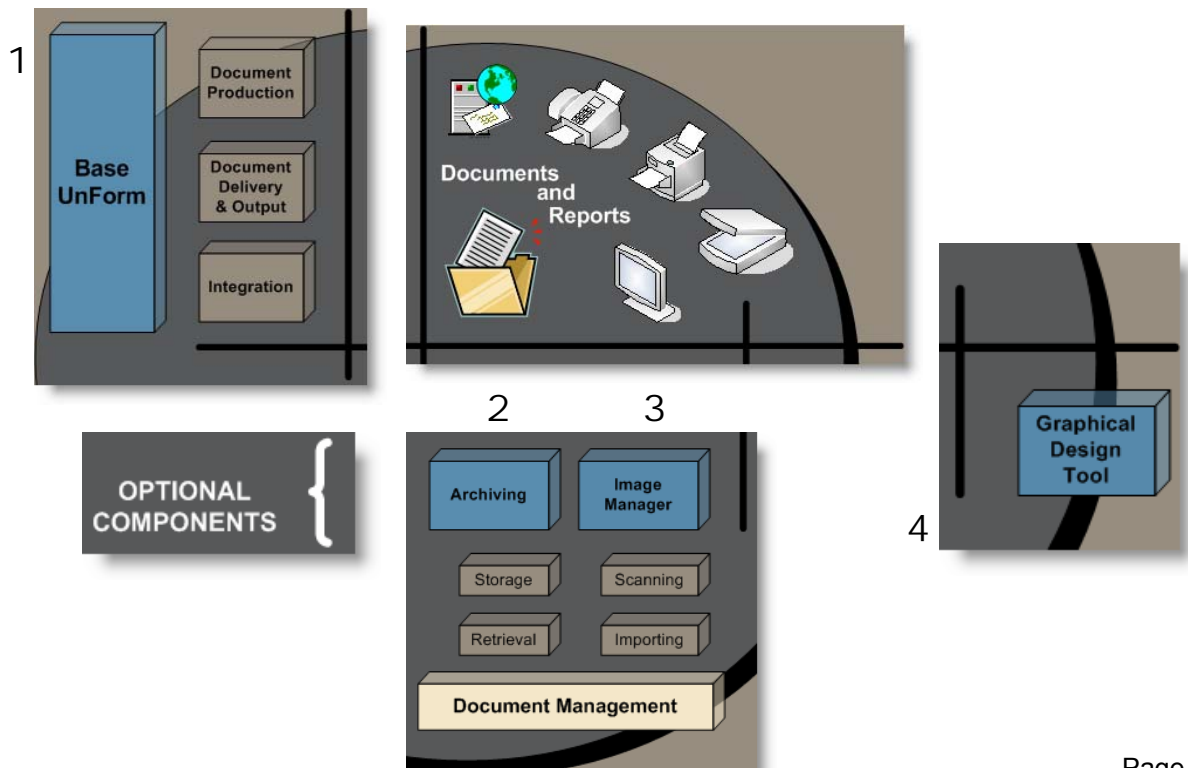
**UnForm®** is feature-rich software which gives **developers** and **integrators** the tools to transparently and seamlessly integrate **document management** capabilities with existing enterprise applications.

- **Enhance forms and reports** from any application,
- **Print** them on compatible network **laser** printers,
- **Display** them in **PDF** format on the **desktop**,
- **Deliver** them electronically via **email** or **fax**,
- **Archive** them **securely** in a **compressed** and **encrypted** format,
- **Capture scanned image** versions of related documents,
- **Retrieve** archived documents **securely** and **easily** using various methods,

... usually **without** modifications needed to applications.

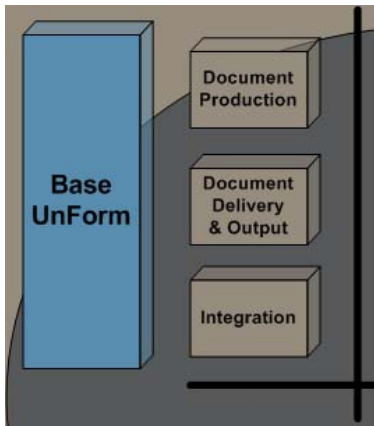
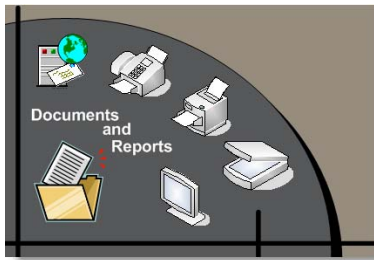
- **Eliminate** pre-printed forms, and generate **professional-looking** output, including reports, adding **images, logos, signatures**, and other **graphical** elements.
- If desired, **eliminate** paper-based printing altogether, and consider electronic delivery.
- Optionally, **implement** an integrated electronic **document archiving and retrieval** system using documents already captured and processed by UnForm, and capture and upload images which can be matched with existing archival documents, if needed.

UnForm's four main components, shown numbered at right, provide a structured document management solution designed for both integrated and independent functionality, a high level of flexibility, and higher cost-benefit ratios compared with competing products



# UnForm

At a Glance ...



## ... Base UnForm

UnForm's base features are grouped into three categories: **Production, Delivery, and Integration.**

The functionality represented by grouping its many base features into these three groups underlines UnForm's **activity-based approach** to document management. It also serves as an outline for understanding, designing and configuring logical, functional and, above all, **efficient** document management systems.

Every UnForm site installs this **advanced technology core** which features a **per-concurrent-print-job licensing model**, ensuring the most economical price for an organization's particular volume of output processing.

With over twelve years of evolving technology sophistication since its initial release in 1994, **UnForm** is a proven leader in Laser and E-Doc systems when it comes to price-to-features ratio.

With the addition of the functionality provided by the new archiving and imaging components, it is a proven, solid foundation for a complete document management solution.

## Document Production



- "Smart" Laser Forms and Reports
- **The most extensive and comprehensive graphic enhancement control available**
- Logos, Images, Signatures, Watermarks
- Static Overlay **AND** Dynamic Content-based features
- **BARCODE, MICR**
- Dynamic Image Conversion
- Tiled Image Attachments

## Document Delivery and Output



- **LASER PCL5, POSTSCRIPT | PDF | TIF | GIF | others | ZEBRA**
- **EMAIL**, integrated | **MSFAX**, integrated | 3<sup>rd</sup> Party **FAX** gateway integration
- **DESKTOP PDF Preview**
- Multi-Copy / Multi-Device Control
- Multi-document batch processing control

## Document System Integration



- API for Transparent, Seamless Integration with Applications
- Integrated programming language
- Extensive document-oriented command and internal function libraries
- Support server for ODBC connectivity and image conversion
- Powerful text-file data retrieval and page-array handling functions

# UnForm

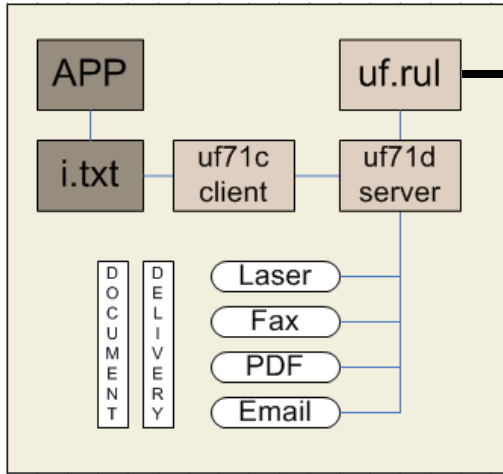
## How it Works ...

### TECHNICAL Overview

Simple For Integrators and Developers to Understand, Configure and Implement

Powerful Control Features

## Base UnForm



A simple depiction of the Base UnForm flow of processing

Your application produces text streams for documents and reports, normally routing them straight to a printer. The UnForm client component is configured to intercept the text streams and route them to the UnForm server component. The UnForm server is listening for requests and when it receives jobs, it processes each against a rule file containing the “rules” for how to enhance and process a particular type of job. Text streams not defined in the rule file pass through as text without any enhancement or processing. Defined form or report text streams in the rule file are processed according to “the rules”. When the job is complete, the server sends the output to the appropriate destination which is either specified by the client or determined by instructions in the rule file.

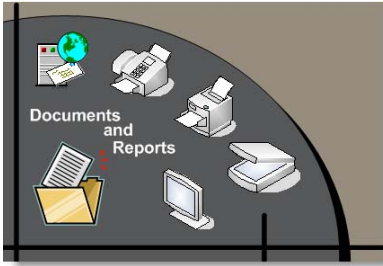
Rule File structure and contents	
<b>// Rule File //</b>	A forms configuration text file containing rule-set sections with commands to apply against incoming text streams. Created and easily maintained using the graphical design tool, or using a simple text editor.
<b>[ Rule Set ]</b>	For each document or report, or generic report format, a rule-set can be detected or specified.
<ul style="list-style-type: none"> <li>■ <b>UnForm Commands</b></li> </ul>	Specific commands and instructions for what enhancements to apply to the incoming text stream, including global or local constant assignments, and expressions.
<ul style="list-style-type: none"> <li>■ <b>{ “Smart Form” Code-Blocks }</b></li> </ul> <p>Programming Syntax and Constructs Custom Expressions Internal variables Internal Functions</p>	Code executed before or after a trigger event ( Pre- and Post-   Device, Job, Page, Copy )  A rich, easy to program environment with a full library of internal variables and functions for building custom expressions and code constructs to produce documents and reports and deliver them digitally via industry standard vehicles.



# UnForm

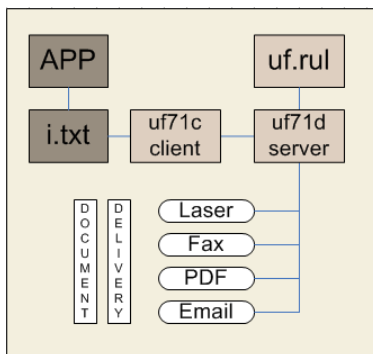
## How it Works ...

### TECHNICAL Overview



► UnForm is compatible with most versions of **UNIX, Linux, AIX, HP-UX, SUN Solaris, Windows 2000, 2003 and XP.**

► UnForm easily integrates with **BBx, ProvideX, Informix, Progress, Oracle, C, Cobol, UniBasic, Pick,** and other development languages.



► **UnForm** uses a form of **intelligent document recognition** to detect forms and reports from a text print-stream, determining output that needs to be enhanced versus output which passes through UnForm unmodified.

- This results in a minimum number of system configuration changes to implement UnForm.
- There is no need to define new printers, or to specify a printer name for each new form.
- UnForm assumes that your application already prints data in the correct positions on a form, and can add enhancements around the printed text, and also can move or erase application data as needed.

► UnForm normally is operated in one of two different ways:

- Via it's **client-server API**, UnForm uses a rich command line syntax, interfacing with application printer interfaces via the `uf71c` (UNIX, Linux) or `uf71c.exe` (Windows) client executables.

Under UNIX or Linux the executable can be interfaced via **PIPE** or redirection. For example, if an application currently prints to the spooler as:

```
| lp -dprinter
```

it can print through UnForm to produce enhanced documents simply by changing the above pipe reference to:

```
| uf71c -args | lp -dprinter
```

- Via the included **TCP/IP port monitor**: primarily for Windows Networks, submitting jobs to the UnForm server can be via direct TCP/IP printing, and allows UnForm to be configured as one or more virtual TCP/IP printers.

► Developers, integrators, and administrators can create rules files using the optional GUI form-design tool, or any text editor, and typical laser forms can be developed in just a few hours.

► Smart-form code-block features allow developers and integrators to build cost-effective processing logic into documents. ► Documents can be structured to perform pre-specified tasks - such as calculations or data retrieval - within the document, before printing or delivery.

► While most laser forms products offer **static overlay capability** only, UnForm offers that ability, **PLUS** dynamic content-based features. For example, signature images can be added to individual purchase orders based on a buyer code. Words or patterns, such as "TOTAL", can become the anchor points for graphical elements such as boxes, font changes, or shade regions.

► Any or all copies of a document can be routed to single or multiple recipients or output devices in the same processing cycle.

With its full programming capability added to its many other layout and graphic enhancement features, UnForm is easily the most flexible and powerful document management tool available

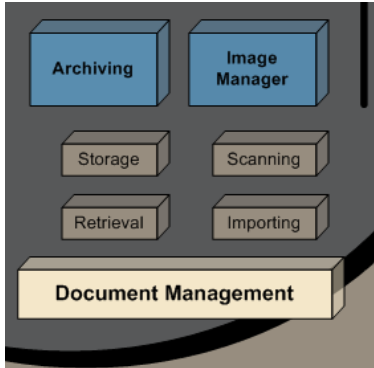


# UnForm

At a Glance ...

## ... the Document Management Components

OPTIONAL  
COMPONENTS {



Trade documents are the life-blood of an organization's economic activity

Close the loop on the document life-cycle by using UnForm's new document management components to archive, retrieve, and purge electronic versions of mission-critical trade documents.

Trade documents are the life-blood of an organization's economic activity, so finding ways to more efficiently store, retrieve, and deliver them within the organization's business process and work-flow environment can contribute to the bottom-line in ways that other operational and administrative initiatives cannot.

The Document Archiving & Management, and Image Manager components are both **optional**, but integrate very closely with base UnForm, leaving it up to the integrator to choose a level of integration and customization that makes sense for each unique installation.

This allows the developer or integrator to configure an end-user system profile based on direct need. Organizations do not pay for unneeded, unused functionality. This helps ensure an economical price, maximizing the efficiency equation for individual organizations.



### Document Archiving & Management

- Document Archival Storage, Retrieval, and Management
- **Rules-based** document archive property and index assignment, **concurrent** with document production and delivery processing
- Fast browser-based **or** application-based archive document retrieval and presentation
- Multi-segment category indexing, browse function drill-down, and **document linking**
- Enterprise-Scalable, with a theoretical capacity of over 4 billion documents per library
- Access to archive store, retrieve, delete and list functions from the **API**, for further integration with existing applications



### Document Image Manager

Image Capture and Uploading, with batch Scanning & Importing tools

- A Windows application
- Integrated Work Environment for capturing and uploading images or files
- **TWAIN**-compliant scanning interface
- Multiple property assignment modes for maximum identification flexibility
- Barcode and OCR zone detection and property value assignment
- Match or group images with parent or related archive documents
- Extensibility via VB-Script

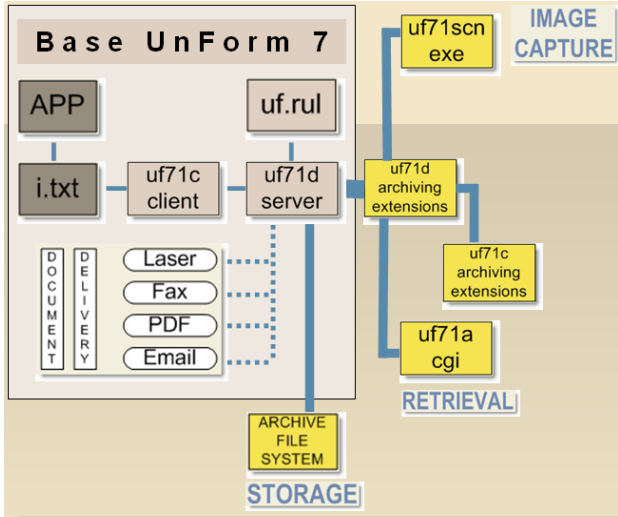
► Match-up signed or related document images with previously archived source documents

# UnForm

Simple For Integrators and Developers to Understand, Configure and Implement



**Powerful Document Indexing and Linking Features For Fast Browse and Retrieval**



## Archiving and Image Management added to the system flow

Server and client command extensions enable archiving of jobs already coming through the UnForm data stream.

**Administration**  
 Security  
 Libraries  
 Maintenance  
 Logout

Action	Type	ID	Title	Date and Time
[X] [E]	Optinvoice	0005131	INVOICE 03/31/04 000100-EverestIndustries	12/04/2007 11:36:52
[X] [E]	Optinvoice	0005132	INVOICE 03/20/04 000100-EverestIndustries	12/04/2007 11:36:54
[X] [E]	Optinvoice	0005133	INVOICE 03/20/04 000300-TaylorSportingGoods	12/04/2007 11:36:59
[X] [E]	Optinvoice	0005134	INVOICE 03/20/04 000800-Industries	12/04/2007 11:36:58
[X] [E]	Optinvoice	0005136	INVOICE 04/04/04 000100-EverestIndustries	12/04/2007 11:37:01
[X] [E]	Optinvoice	0005137	INVOICE 04/05/04 000100-EverestIndustries	12/04/2007 11:37:02
[X] [E]	Optinvoice	0005138	INVOICE 04/06/04 000100-EverestIndustries	12/04/2007 11:37:03
[X] [E]	Optinvoice	0005139	INVOICE 04/07/04 000100-EverestIndustries	12/04/2007 11:37:04
[X] [E]	Optinvoice	0005140	INVOICE 04/08/04 000100-EverestIndustries	12/04/2007 11:37:05
[X] [E]	Optinvoice	0005141	INVOICE 04/09/04 000100-EverestIndustries	12/04/2007 11:37:06

A "universal" HTML web browser client provides a rich archive retrieval system via CGI, providing **secure** access from virtually anywhere to **compressed** and **encrypted** archive documents, without need for individual client workstation configuration.

# How they Work ...

## Document Management Components

Can be minimally configured with a single interface command to archive all rulefile-defined documents to a single archive library,

OR ...

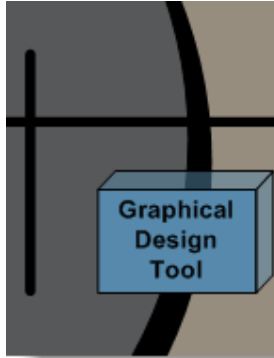
Can be configured for multi-library storage via the simple new rule-file archive command which has full access to the underlying document text, providing powerful customized indexing and meta-data property assignment capability.

In addition to the rich browser archive retrieval, management, and administration interface provided, both **CGI-URL** methods and client-server **API** methods are available to retrieve archived documents from within an existing application.

The **Image Manager** component, a Windows client application, is a **scanning and importing** tool for **capture** and proper **retrieval-indexing** of documents external to the UnForm processing environment. For maximum flexibility, images uploaded to the archive can be independently indexed, or can append to a parent document as a sub-image, or can be grouped via custom category assignments. Parent document properties can be updated based on image manager activities for work-flow control.

# UnForm

For the Integrator ...



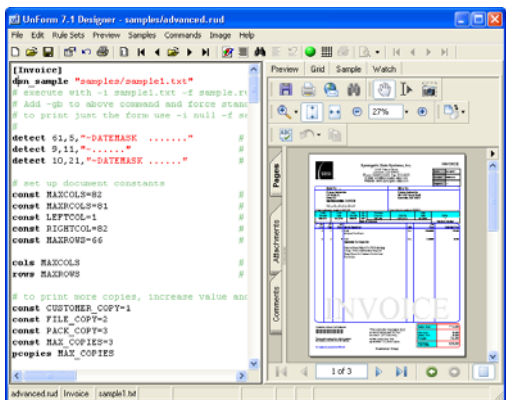
Graphical  
Design  
Tool

## Design and customize the appearance of forms and reports right from your Windows Desktop.

The UnForm Form Design Tool is a Windows-based tool used to design and individualize the appearance of documents from any application. Forms can be created quickly and efficiently right from your desktop, shortening the time to meet your unique requirements.

The Design Tool allows you to customize documents as well as specify the routing process to a variety of digital destinations, including archives. The designer is a tool that's easy to learn and use, and lets you simply point and click and see your results instantly. Editing a logo, address, telephone number, watermark, or even producing a completely new document, can be just a few minutes work with the graphical forms designer.

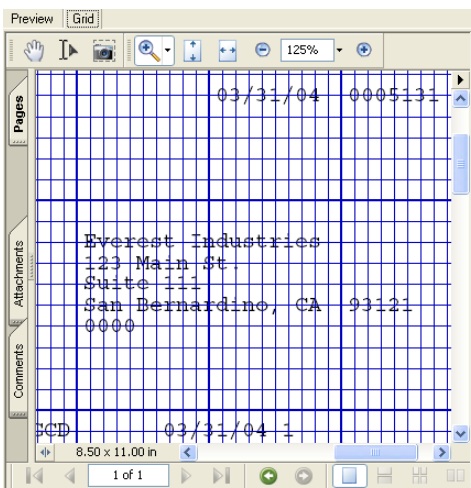
UnForm and the Design Tool offer a unique **Integrated Design Environment** that uses sample data from your application, UnForm's print server software, and the Design Tool collectively during the form development process. Forms previously created for UnForm can also be edited with the UnForm Design Tool.



**Main IDE: left-pane rule-set and command editor, right-pane PDF preview of form design**

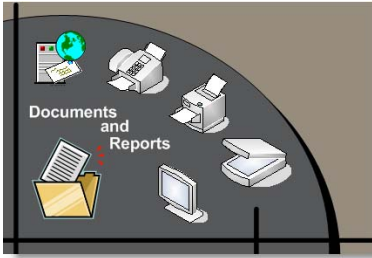
## Key Features:

- Integrated design environment, with syntax checking and pop-up command editors
- Create rules-driven formats to automate the forms output process
- Deliver documents customized to your requirements via print, e-mail, and fax
- Easy to design and maintain, high-level "smart-forms" processing logic for complex forms
- Drawing for graphical elements for your form based output
- Document preview to review document formatting prior to installation
- Text grid preview for detailed placement analysis
- Easy layout for logos, images, watermarks, graphics and text



**Text-grid preview toggle**

# UnForm



## Continuing Evolution ...

Existing users and integrators can upgrade to obtain enhancements contained in UnForm 7.1, the latest release of the software.

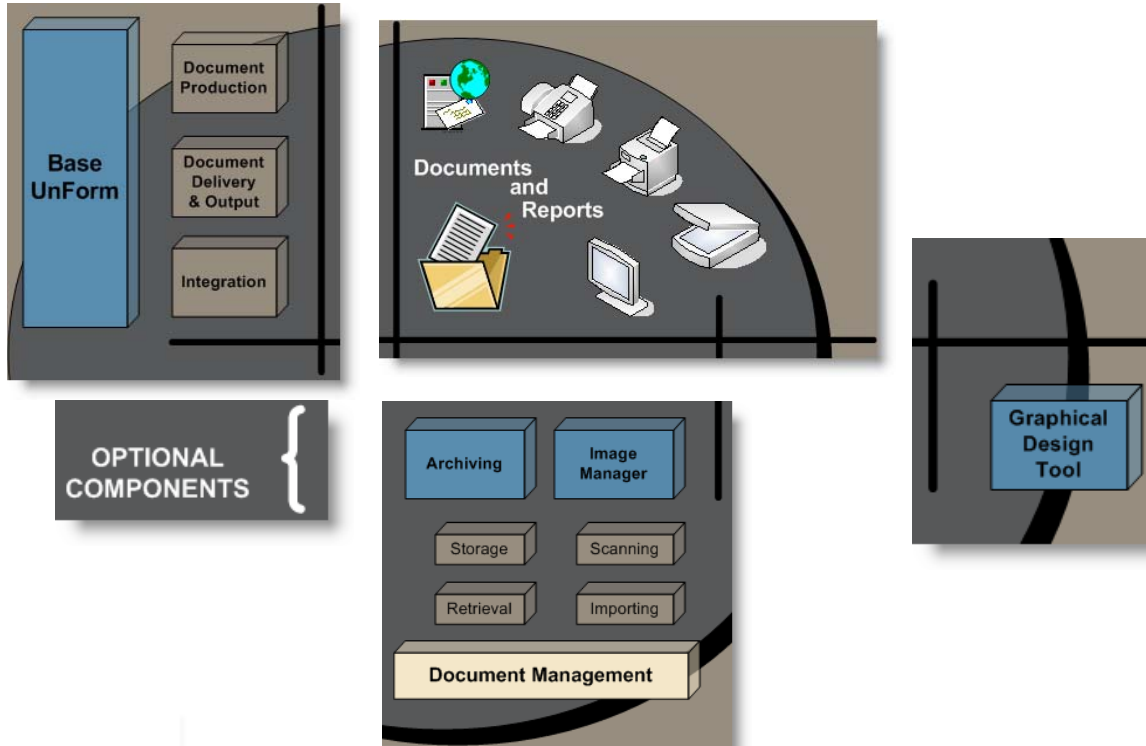
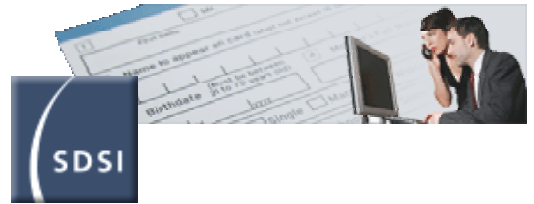
UnForm 7.1's new features are shown side-by-side with major capabilities introduced in prior releases.

Customers of SDSI and its resellers can look forward to frequent updates which expand and refine the functionality of the software.

Version 6	NEW in 7.1
<b>ENVIRONMENT</b>	
<ul style="list-style-type: none"> <li>Platform-independent, UNIX, Linux, Windows</li> <li>Client-server architecture</li> </ul>	<ul style="list-style-type: none"> <li>Windows-based SUPPORT SERVER, providing image conversion, ODBC connectivity, access to MSFAX</li> </ul>
<b>OPTIONAL COMPONENTS</b>	
<ul style="list-style-type: none"> <li>Windows-based IDE providing a Graphical design tool for forms development</li> </ul>	<ul style="list-style-type: none"> <li>Document Archive Storage &amp; Retrieval</li> <li>Document Image Manager, including scanning / importing</li> <li>Design Tool Enhancements</li> <li>7.1 .. sdOffice Integration for Office automation</li> </ul>
<b>DELIVERY &amp; OUTPUT</b>	
<ul style="list-style-type: none"> <li>Laser Forms</li> <li>Presentation-quality reports</li> <li>PCL-5 compatible</li> <li>Color printer support</li> <li>Adobe PDF, EMAIL PDF</li> <li>FAX gateway interface</li> <li>BARCODE</li> <li>MICR</li> <li>ZEBRA</li> <li>HTML reports</li> </ul>	<ul style="list-style-type: none"> <li>POSTSCRIPT compatible</li> <li>FAX via MSFAX</li> <li>Tiled-Images attachment via new IMAGES command</li> <li>7.1 .. Desktop Delivery, including user forms dialogue during document generation</li> </ul>
<b>CONTROL</b>	
<ul style="list-style-type: none"> <li>Duplex, Tray, and Bin control</li> <li>Multiple unique copies control</li> <li>Dynamic output device changes</li> <li>Integrated programming language</li> <li>Rich function / expression library</li> <li>Sub-Job support for simultaneous multiple routing</li> </ul>	<ul style="list-style-type: none"> <li>Expanded conditional control</li> <li>Over 50 new code-block functions, including ODBC connectivity, multiple types of text file data retrieval, multi-page array handling, page-insertion</li> <li>12 new mainline rule commands</li> </ul>
<b>Document &amp; Text Enhancement</b>	
<ul style="list-style-type: none"> <li>Font and other attribute changes</li> <li>Erase or move of any input stream text</li> <li>Boxes and lines of any dimension, with optional shading and edge-width control</li> <li>Rounded box corners</li> <li>Grid options in box drawing</li> <li>Graphical shading</li> <li>Case conversion</li> <li>Text additions in any device</li> <li>font/color/size/position</li> <li>Shade regions in any device</li> <li>shade-grade/color</li> <li>Multi-line text handling</li> </ul>	<ul style="list-style-type: none"> <li>Angled LINE Draw</li> <li>CIRCLE Draw</li> </ul>

# UnForm

Platform-Independent, Client-Server  
Document Management Solution  
For UNIX, Linux and Windows



Free 30 day trial copies of UnForm 7.1 including Document Management, the UnForm Image Manager, and the UnForm GUI Design Tool are available on our website ([www.unform.com](http://www.unform.com)).

Trial copies are fully functional, and include full documentation and samples. SDSI offers free technical support for product evaluation.

Synergetic Data Systems, Inc. (SDSI) is a developer of unique horizontal software products for the Unix and Windows marketplace, and specializes in creating productivity-enhancing products for developers and end-users.

Since 1988, SDSI software has been implemented in over 9,000 installations at business organizations worldwide.

For more information or to download demonstration versions visit [www.synergetic-data.com](http://www.synergetic-data.com)

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