

# DocOrigin White Paper

Premier Document Generation Software for Businesses



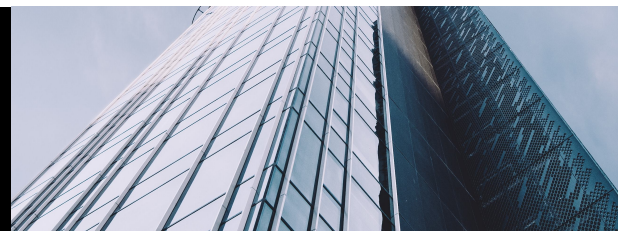
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# Introduction



Businesses are taking advantage of new technology by making significant investments in business management software such as Enterprise Resource Planning (ERP) and Customer relationship management (CRM) software used for collecting, storing, managing, and interpreting data. However, businesses often underestimate the human and financial resources required to integrate their system with their Document Generation Solution. Document-based transactions allow businesses to operate outside of their walls and remain an essential part of every business, whether they are delivered electronically in PDF format or by print.

In addition, many Document Generation Solutions have been sunset, leaving companies vulnerable by running unsupported software. Each technological upgrade brings the potential risk of failure, but upgrades are crucial to maintaining a secure and stable environment.

Businesses are searching for a Document Generation Solution with a robust merge engine for high-volume output generation. A solution that is flexible to easily integrate with the host system as well as the third-party tools used for additional processes such as archive and email. And provide a migration path that includes a template conversion service and data filters to support any data format, including Adobe Output Central Field Nominated files, Print Image Files, CSV, XML, and JSON.

Documents are the universal tool for communicating with anyone and everyone. They are often the first impression and constant touchpoint to our coworkers, customers, vendors, and partners. They are not limited to the traditional print device or fax server as they were in the past. They can be presented in PDF, a Portable Document Format. A term that is often underestimated. It remains our collective tool, displayed on nearly any device, with consistency and accuracy, including a mobile phone, tablet, laptop, or large monitor. It can be posted online, emailed, archived, and, yes, even printed. So, documents are not going away; they are just evolving but remain a critical vehicle for nearly every business process.

The final form or method of transmission matters little if document originators ignore basic document composition tenets such as document organization, readability, and relevance. Business communications should be clear, concise, and actionable. Document industry professionals make them so.

# Overview

DocOrigin is a document generation solution with a form design component and data transformation filters that will integrate with new or legacy systems. Its merge and print engine generates high-quality documents in many formats, while offering configuration flexibility to fit into your systems.

## Highlights

DocOrigin is an enterprise-class document generation solution consisting of multiple programs, tools and web applications that can be integrated with your existing systems without having to modify your line-of-business (e.g. SAP) application or its data format in any way. It is available for Windows, Linux, AIX and IBMi. All of the product's files use standard XML or plain text. DocOrigin supports multiple character encoding schemes, and locale processing.

## Document Generation Process

To create output, an XML-based form design is created via the Design program. The DocOrigin Merge tool creates an in-memory form DOM. Merge reads a nominated customer data file, possibly filtering it into XML, and produces a data DOM. Sections of the form are replicated as needed to contain all the data to create a document DOM. Merge then paginates that document DOM and applies (a) user-chosen print configuration file(s) to generate professional quality output in one or more industry-standard formats.

During that process, if warranted, JavaScript can be applied. DocOrigin uses an integrated standard JavaScript engine that has been extended to support DOM access, do file I/O, run external programs, do ODBC lookup, send an email, and more. The core Merge functionality can be invoked directly from the command line, using the included Folder Monitor program to process submitted data files, via customer-issued web service calls, or by using the Design software's preview functionality. In some cases customizable scripts process submitted data files to decide which, possibly multi-step, processing should be applied.

The Merge executable supports many option specifications to control your output processing. Standard parameter files are provided but these can be adjusted via user override files, options on the command line, instructions in the data's PI, and even via "tags" added to individual form objects in the form template. Overrides operate in a given precedence order, so defaults can be established to simplify usage and maintenance.

## Multiple Outputs in a Single Run

DocOrigin has drivers for standard industry formats including PDF, HTML, PCL, PostScript, Zebra, TEC, Windows print drivers, XML, and more. In a single run, Merge can create multiple types of output going to different destinations. DocOrigin has a built-in, configurable, email mechanism that can be used during the Merge run or after the fact. You can also integrate existing document pages straight out of PDF files directly into the output (e.g. insurance policy riders, terms & conditions). DocOrigin can produce PDF/UA-compliant documents and fillable HTML and PDF documents.

## Additional Programs and Tools

DocOrigin includes a Queue Monitor service (for Windows) which can be used to pipe existing print streams of data into a watched folder for processing. There are tools for filtering and sorting data, combining form templates, extracting single documents from a batch, and more. DocOrigin's architecture allows the dynamic runtime use of customer supplied tools, be that a proprietary customer-specific tool or a general tool (e.g. ImageMagick).

## Forms Software Replacement

If you are migrating from another document generation system, DocOrigin provides a form conversion tool which can take PDF, IFD, and XDP files and instantly convert them to DocOrigin's design format (XATW) to massively kick-start your forms migration process. In some cases, no further template development is needed.

DocOrigin has built-in data filters and a Filter Editor tool to create custom data filters facilitating support for data in any format, including XML, JSON, CSV, FNF, DAT, and plain text, so you can continue to use the data currently being produced by your system. DocOrigin's Merge engine supports use of customer-supplied filters, and the chaining of one filter to another. Implicit data mapping simplifies the process of connecting your current data streams with DocOrigin form templates.



# Benefits

## Customer-Driven Product Development

With its use of Mozilla's open-source technology JavaScript, DocOrigin has practically limitless possibilities for solving complex business scenarios related to document generation. Our product enhancements are customer-driven so if any fringe scenario does create additional requirements, our team works rapidly to develop a solution. We release new versions of the product quarterly, but we can also create hotfix releases for any urgent customer-required enhancements. Our releases are backward compatible on a continuing basis, so you can upgrade safely even after a few years. When you do decide to upgrade, product reinstallation takes less than a minute.

## DocOrigin for an OEM

DocOrigin is a great choice for OEMs because it is so highly configurable and its core functionality can be invoked in many ways, allowing it to be included in almost any product regardless of how that product is set up. DocOrigin can take care of the complexities of document generation such as handling varying printer types and models, proprietary fonts, and viewing documents on phones, tablets, PC, paper, by email, fax and SMS.

## Performance

DocOrigin's performance is of the highest quality. It is extremely fast and, by our testing, runs 300% faster than other leading software (AEM). Our Folder Monitor tool has an uptime of 99.9% and supports concurrent processing of multiple data inputs.

## Portability

DocOrigin has a folder path configuration file/feature, which means that hard-coded paths can be avoided. This simplifies moving or sharing collateral from one server to another. You can develop on one server, then promote your files to a production server and just update the file path configuration.

# Universal Template Design

## Company Challenge

Our product development is not only driven by customer feedback but by our Universal Template strategy. Eclipse examined all variables that impact an organization such as company acquisitions, international coverage, customization, and regulatory changes. Although most of these changes are good, indicating company growth, they also come at a cost of time, financial investment, and personnel resources. At Eclipse, we believe you should not have to rely on your Information Technology team to make content changes. Instead, design a single, smart, universal template that defines the “placeholder” for variable information. As a result, content changes remain in the hands of the owner who simply provides the updated resource(s).

## Our Solution

DocOrigin was designed for maximum template flexibility. We have created ways for users to keep content “outside” of the template and to maintain repeated design elements in only one place. This makes it easier to keep templates up to date and consistent across your organization.

When you design with DocOrigin, you create each section of a document only once, and those sections are printed as many times as required to house all data supplied. Sections can be identified as headers or footers to be used on multiple page layouts. Tables can be designed with a single data row which is repeated as needed.

DocOrigin supports the use of multiple languages with a single template. Translations for text can be managed using a “profile” file. Profile files can also be used to manage variable content like logos and colors so multiple subsidiaries can use a single template effectively.

Fragment libraries are another way to manage like content across multiple templates. You can save any form section as a fragment which can then be embedded in multiple forms.

Forms can be combined to create a single output document. If you have a standard cover letter, you can keep it as a separate design file instead of maintaining it in multiple templates.

The inclusion of external documents is possible using the stitching feature which can produce PDF and/or PCL output. This can be especially useful for legal boilerplate text like terms and conditions as these documents can be presented exactly as authorized. Another way to include external text is by referencing an RTF file. This reference can be hard-coded in your template or dynamically included based on your data stream.

Furthermore, these techniques which keep the content of documents removed from the template allow the content owners to edit and make changes without requiring support from a forms designer or system administrator. DocOrigin has a web application component called Business Communication Center (BCC) to restrict content management by user groups or departments. BCC also allows you to make marketing or informational “campaigns” by managing the use of images, ads, and additional text with rules-based decisions on content inclusion.

## Eclipse Business Communications Center

Take advantage of true, data-driven presentation and delivery methods to meet on demand business conditions.

Reduce Demand on IT Department | Create transactional documents that meet corporate standards for branding and regulatory compliance without engaging the IT department.

Secure Controlled Access | Role-based access permission allows administrators to limit access, visibility, and functionality depending on user roles and responsibilities. Administrators define user access to specific departments, so they only see the documents relevant to their department(s).

Dynamic White Space Management (DWSM) | Insert images, barcodes, and rich text in designated areas while protecting the integrity of the document template.

Simple User Interface | Allows the business stakeholders that are most familiar with the document requirements to develop and maintain critical business content.

Targeted Marketing & Messaging | Build data-driven marketing and messaging for effective, relevant communication. Upsell products, caution recipients of hazardous materials, or highlight critical deadlines and regulations.

Asset and Definition Date Control | Define date ranges for template definitions and assets to automatically start and end promotions, pricing, regulations, and more.

# Industry Guidance

If you are looking for a document generation solution that is reliable, fast, space-efficient, cost-effective, enterprise-class, multinational, highly customizable, and one that has impeccable customer support, please consider DocOrigin. This product was created by a team with hundreds of years of combined experience in the industry working at companies including Adobe and JetForm. DocOrigin was designed to integrate legacy and line-of-business software of any kind. Our motto, "Integration without modification" means that the data streams you already have can be used as-is by DocOrigin to create your business documents.

## Who should use DocOrigin?

Our main customer groups are (1) companies replacing an existing forms software solution such as Adobe LiveCycle, or JetForm, or (2) OEM partners using DocOrigin as a part of their custom software applications, and (3) companies who are adding forms software to their business to mechanize document production.

DocOrigin is a solution for big and small businesses. We have scalable pricing to suit every size of company. On the tech side, DocOrigin can produce thousands of documents a minute. DocOrigin works for all industries. It can be used to produce any type of document, including invoices, purchase orders, checks, packing slips, shipping labels, bank statements, transcripts, tax forms, utility bills, permits, intake surveys, insurance applications, declarations, business cards, medical wristbands, and more. DocOrigin produces PDF, PCL, PostScript, and also Zebra & TEC labels and PDF/UA-compliant documents. For limited purposes, it can also produce fillable HTML and PDF.

DocOrigin is used by companies worldwide. It supports the use of multiple languages, including English, French, German, Swedish, Spanish, Italian, Finnish, Norwegian, Danish, Portuguese, Czech, Polish, Hungarian, Russian, Simplified Chinese, Traditional Chinese, Korean and Japanese. The use of locale settings accounts for regional formatting, enhancing the quality of your customer communications.

## Migration Process

One of the best things about DocOrigin is that you can do a gradual migration, one document at a time, from your old system to your new system, running them in parallel instead of having a moment where you "flip the switch" and hope all your testing has gone perfectly. Eclipse Corp. provides a forms conversion service/tool which can take PDF, DOCX/DOC, IFD, and XDP files and instantly convert them to DocOrigin's design format (XATW) to massively kick-start your forms migration process. In some cases, no further template development is needed.

# Product Support Details

DocOrigin offers online or in-person training sessions for form designers and system administrators. These sessions are individualized for each company and focus on the specific types of business documents you will produce and how DocOrigin will be set up and run on your server(s).

We have a customer resource website that houses our extensive documentation on the product. There is a Reference Manual for more technical users to get into the nitty-gritty of DocOrigin's highly customizable tools and there is a User Guide for form designers and less technical users which explains how to use our product with samples, tutorials, videos, and step by step instructions. We also have a "technical blog" which hosts some "nerdy" articles on hot product topics for those of us who are seriously immersed in the document generation world.

The best thing about being a DocOrigin customer is that we are a small team and so, regardless of who you exchange emails with, you are getting the support of the whole engineering team and often the CTO. We use Zoho to manage inquiries and also answer direct emails. We constantly work with our customers and resellers to make sure that any issues are solved ASAP, and we use this customer feedback to drive new product enhancements.

Connect with an Eclipse Corporation representative today.

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