



JacanaForms Overview

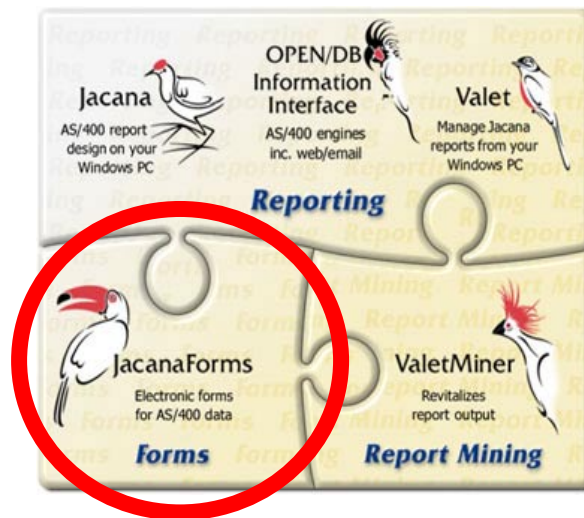
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EXECUTIVE OVERVIEW

JacanaForms, part of Momentum's information retrieval product set, uniquely combines iSeries-400 report writing with form design and printer technologies. JacanaForms's powerful electronic form capabilities offers significant business advantages over outdated print technology or software designed for old impact printers and pre-printed forms.



Tackling Business Issues

Financial, manufacturing, distribution, billing and human resource applications are the backbone of your business and have taken many years of effort to develop and implement. They have usually been painstakingly tailored to meet the needs of your business. But have you thought about the documents that you output from these applications? Have you tailored them to meet your operational needs or those of your customers?

What do your customers see when you send them an order confirmation, an invoice or shipping document? Do they see a sophisticated, easy to understand document that portrays a high quality image of your company, or a poorly aligned pre-printed form or worse, an unstructured report-like output? *A printed document is one of your key 'touchpoints' with your customers.*

A properly formatted, easy to read document is important for effective communication and is a critical part of overall customer satisfaction. Never underestimate the impact of a printed document.

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In a global, competitive business environment, documents must be created and delivered world-wide. A document must meet legal requirements for the location in which it is distributed. Therefore, any international business, managing multiple business entities or sites, can have numerous requirements for a single document, such as an invoice.

Where once all printing was done centrally and distributed manually, now high function, low cost printers can be placed at point-of-need. This change from a 'print, then distribute' to a 'distribute electronically, then print' model can significantly improve the timeliness and responsiveness of your business operations.

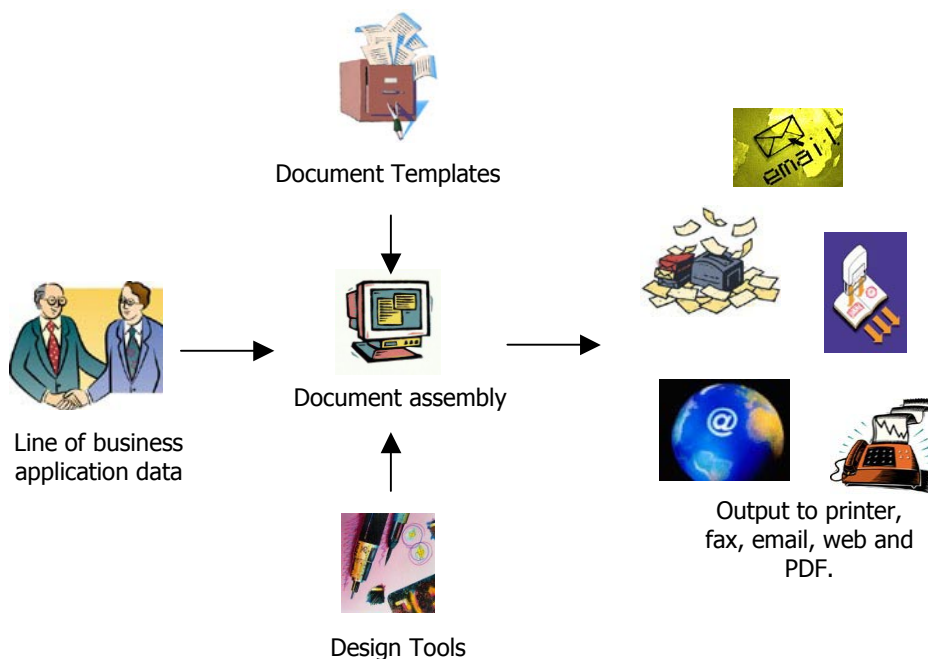
Your organization can derive many benefits from JacanaForms allowing you to create and generate sophisticated printed documents from your mainstream applications, while at the same time reducing the cost and effort of generating that printed output.

Create professional looking output and a better image for your organization

Pre-printed forms are static, inefficient and often outdated. With JacanaForms you overcome these obstacles by exploiting the advantages of intelligent, dynamic, and context-sensitive e-forms.

JacanaForms is a fast, easy way to print forms from your applications. It's easy to add any kind of logo, complex graphics, bar codes or watermarks as well as create multi-page or multi-part forms. Forms are easy to change and maintain because no programming expertise is needed. JacanaForms offers direct cost savings and greater productivity.

Your existing applications will require no changes or modifications. You are not just restricted to printed output, JacanaForms can output to print, fax, email, web and PDF.



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Business Benefits

Even in the electronic age most businesses still run on paper. From invoices to statements to shipping documents to checks, it's estimated that 83% of all business documents are paper forms. Just printing all that paper costs billions. Storing, distributing and processing it costs many times more. Getting control of those costs can give your business a competitive edge.

Implementing JacanaForms can bring advantages to your business:

Economy – no expensive stock of pre-printed forms

Electronic forms can be printed when and where you want them, directly onto low-cost plain paper stock. Any existing paper form, whether cutsheet, multi-page or multi-part can be replaced with an electronic form.

Efficiency – no missing forms

Forms are always where they're needed, when they're needed. Distributed printing permits a single application data stream to output in several locations simultaneously – a user can generate an invoice in the billing department and a fulfilment order in the shipping department, both 'just in time'.

Productivity – no wasted time

Quick to implement for new applications and quick to update when application requirements move on. JacanaForms works outside your applications, which means you can perform ongoing maintenance of forms completely within the cost-effective, easy to configure JacanaForms environment, rather than through expensive, ground-up re-programming of the application itself.

Creativity – no limits

You can tailor forms for any situation. You can print checks or shipping documents, or improve the presentation of management or customer reporting. You can even implement turn-around documents by printing bar codes, MICR or OCR characters on your output forms.

Adaptability – no application barriers

Static legacy applications can now take advantage of the most sophisticated laser printing, by tapping the power of JacanaForms' transformation capabilities. Equally, new outputs can be quickly constructed using the unique combination of Jacana-OPEN/DB and JacanaForms working together.

Usability – minimal learning curve

JacanaForms works in the familiar MS Windows environment. The graphical environment for designing electronic forms or transforming heritage output is a matter of point-and-click.

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Quality – no excuses

Output doesn't have to be dull. JacanaForms' design capability offers form designers the full range of features to create form output, from the simple to the most advanced. Now it's easy to not only improve the appearance and layout of all your management and customer information, but also to enhance the quality and "readability" of production reports. In a competitive business world, your unique output can help differentiate your product and your company.

Compatibility – no conflicts

JacanaForms supports a wide variety of printers --- desktop, mid-range, high speed models using PCL, Postscript, Xerox Metacode, and thermal transfer label printers. Specialized print drivers ensure output at the rated speed of your laser printers. JacanaForms is scaleable --- works for a small workgroup or across an entire organisation.

Reliability – no worries

JacanaForms offers a complete solution to streamlining your printing. Once implemented, printing requires virtually no operator intervention. JacanaForms automates the complete life cycle of business forms, from designing to printing.

Your organization can derive many benefits from JacanaForms, with new, sophisticated, printed documents from your applications, while at the same time reducing the cost and effort of generating printed output. JacanaForms will also reduce the maintenance costs associated with tailoring document output, since it effectively separates document design and layout, from application development!

Printing with professional quality, JacanaForms integrates and automates printing --- any form, any printer, any printer feature, any application, anywhere, anytime!

JacanaForms

From Printed Output to Electronic Form

JacanaForms takes your organization's printed output, whether that is a heritage report or a new output, turning it from the rather ordinary.....

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** PURCHASE ORDER **
P000013 - 01
MANUFACTURING SPECIALIST
9850 RIVEREDGE PARKWAY
ATLANTA, GA 30066

HEAVY SUPPLY CO.
BANK AVE
INDUSTRIAL PARK
SALENDER, MA 66044
MANUFACTURING SPECIALIST
9850 RIVEREDGE PARKWAY
ATLANTA GA 30067 1

7073321234
IN-US DOLLARS
9/03/98 000600 OUR TRUCK SHIPPING POINT NET 30 DAYS SEE BODY
JOHN SPRAYER 100
****REVISION--01--****

ITEM- 03426
TUBE 8 IN DIA
CHROME-PLATED TANK TUBE W/ BURLD ENDS
HIGH POLISH, PROTECTIVE FINISH *BLANKET
TOTAL BLANKET ORDER QTY.** SEE BELOW 80.000 CS 120.0000
TOTAL QTY. RECVD TO DATE 4.000
LAST QTY REC'D. 2.880 ON 8/01/95
HANDLE MUST BE MADE OF THE BEST QUALITY
MATERIAL - CARBON STEEL
MAKE SURE THE VALVE OPENING WILL MEET
INDUSTRY STANDARDS
THIS ITEM QUANTITY WAS CHANGED
WAS 2.000, CHANGED 08/01/95
THIS ITEM QUANTITY WAS CHANGED
WAS 100.000, CHANGED 08/01/95
#0001 DELIVER ON 9/11/95 1.000 CS 5.2075 5.21
THIS ITEM DCK DATE WAS CHANGED
WAS 09/01/95, CHANGED 08/01/95
#0002 DELIVER ON 9/11/95 5.000 CS 5.2075 26.04
#0003 DELIVER ON 9/18/95 5.000 CS 5.2075 26.04
#0004 DELIVER ON 9/25/95 50.000 CS .0083 .42
TOTAL OUTSTANDING 61.000 57.71
    
```

into highly effective, professional looking documents, employing creative design elements such as graphics, boxes, shading, bolding, colors, bar codes and much more.....

SHIP TO	MANUFACTURING SPECIALIST 9850 RIVEREDGE PARKWAY ATLANTA, GA 30066	P.O. DATE 9/03/98 PAGE 1 BUYER # 100 VENDOR 000600 DELIVER SEE BODY			
	HEAVY SUPPLY CO. BANK AVE INDUSTRIAL PARK SALENDER, MA 66044				
MAIL TO	MANUFACTURING SPECIALIST 9850 RIVEREDGE PARKWAY ATLANTA GA 30067	P.O. NUMBER	P000013 - 01		
BILL TO	MANUFACTURING SPECIALIST 9850 RIVEREDGE PARKWAY ATLANTA GA 30067	PLACED WITH	7073321234		
		PHONE	7073321234		
		FAX			
SPECIAL CHARGES		FREIGHT	CURRENCY	BUYER: JOHN SPRAYER	
			IN-US DOLLARS	PHONE:	
PURCHASE ORDER	DETAILS	DELIVER DATE	UM	UNIT PRICE	AMOUNT
	****REVISION--01--****				
	ITEM- 03426				
	TUBE 8 IN DIA				
	CHROME-PLATED TANK TUBE W/ BURLD ENDS				
	HIGH POLISH, PROTECTIVE FINISH *BLANKET		80.000 CS	120.0000	
	TOTAL BLANKET ORDER QTY.** SEE BELOW				
	TOTAL QTY. RECVD TO DATE 4.000				
	LAST QTY REC'D. 2.880 ON 8/01/95				
	HANDLE MUST BE MADE OF THE BEST QUALITY				
	MATERIAL - CARBON STEEL				
	MAKE SURE THE VALVE OPENING WILL MEET				
INDUSTRY STANDARDS					
THIS ITEM QUANTITY WAS CHANGED					
WAS 2.000, CHANGED 08/01/95					
THIS ITEM QUANTITY WAS CHANGED					
WAS 100.000, CHANGED 08/01/95					
#0001 DELIVER ON 9/11/95		1.000 CS	5.2075	5.21	
THIS ITEM DCK DATE WAS CHANGED					
WAS 09/01/95, CHANGED 08/01/95					
#0002 DELIVER ON 9/11/95		5.000 CS	5.2075	26.04	
#0003 DELIVER ON 9/18/95		5.000 CS	5.2075	26.04	
#0004 DELIVER ON 9/25/95		50.000 CS	.0083	.42	
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SHIP VIA	FOB DESC	TERMS	TOTAL	57.71	
OUR TRUCK	SHIPPING POINT	NET 30 DAYS			

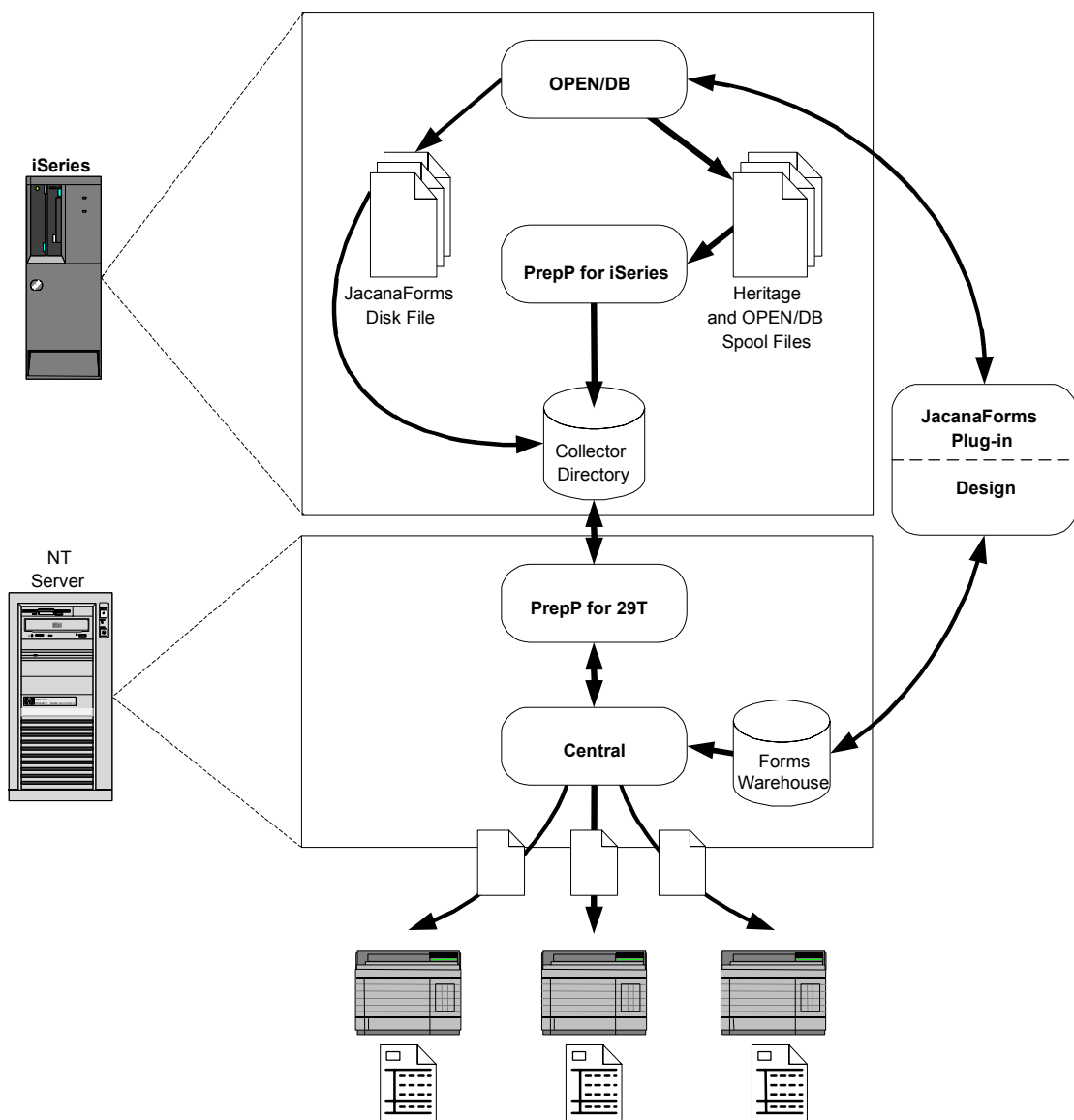
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PRODUCT OVERVIEW

JacanaForms combines the report writer technology of Momentum Utilities (OPEN/DB) with the forms and printing "know how" of Accelio Corporation (formerly known as JetForm Corporation).

The schematic below outlines the electronic form production process.

JacanaForms Overview Schematic



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The JacanaForms solution comprises the following integrated components:

- ***JacanaForms 'plug in' to OPEN/DB***
 - the unique interface allowing use of data extracted by OPEN/DB in the design of e-forms
- ***Design***
 - the graphical design tool for creating e-forms
- ***Visual Transformation Editor***
 - the graphical tool enabling e-forms to be mapped to heritage report output
- ***PrepP for iSeries***
 - service providing automatic polling of iSeries-400 output queues to identify spool files for processing by JacanaForms and placing them into a specified folder
- ***PrepP for 29T***
 - service operating on the NT server scans for new print tasks by automatic polling of specified iSeries-400 folders to pick up spool files delivered by PrepP for iSeries and passing them to Central or other predetermined destinations.
- ***Central***
 - providing automatic merge of data extracted from the iSeries-400 with a stored e-form design to produce laser quality printing and managing the administration of e-forms in a networked environment.

The JacanaForms solution can be divided into two discreet stages:

- 1) Form creation, using Design.
- 2) Merging and printing of the form, with the report data, through Central.

Read on for more details of the electronic forms process....

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JacanaForms Overview - how the pieces work together

Formatting And Data Are Kept Separate

To produce the form output both *formatting elements* and *data elements* are needed.

Formatting elements such as the position of the data fields, their font types, graphics - such as rectangles, circles or shading, are stored in the electronic form and not in the application. *Data elements* have to be identified and extracted from the application. Therefore, if the data on the form needs to be moved or reformatted, no changes are necessary to the application itself, only to the form.

Central handles the merging of the *formatting elements* and the *data elements* as part of the production process. Central is optimized to process application data received in a *field nominated format (FNF)*. A field nominated data stream is simply an ASCII file with 'field tags' preceding each *data element* to be printed in the electronic form.

In the form development process, the *formatting elements*, or attributes, are identified as the form is created using Design. Fields and other objects, such as graphics, logos etc, are selected and dragged to the required location. Font and other *formatting* attributes, including bar-codes, which can be used to represent the *data* in any field required, are specified at this time through a pop-up window.

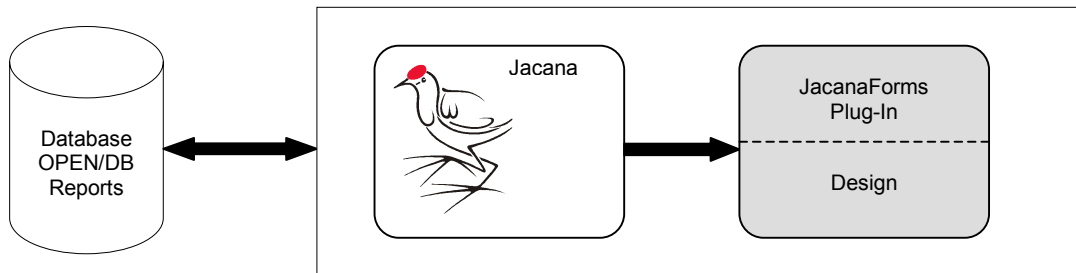
JacanaForms provides two methods of identifying the *data elements* required in the e-form and enabling the required data to be output in a *field nominated format*:

- For **new** reports --- use Jacana-OPEN/DB
- For **existing** reports --- use Visual Transformation Editor

New Reports --- Jacana-OPEN/DB Combined With The Jacanaforms 'Plug-In'

Accessing the database can be a major obstacle to employing electronic forms technology, particularly when a completely new output is required i.e. there is no existing report to use as a base point for supplying the data to the form. Understanding, identifying and, most importantly, linking the fields in the database or processed data, with the electronic form itself, is a major challenge. The JacanaForms Plug-In, a distinctive feature of the complete JacanaForms solution, allows the fields in a Jacana - OPEN/DB created report to be directly associated with, and used in, the design of an electronic form. At last the form designer can concentrate on form design without worrying about the underlying technicalities involved in data processing.

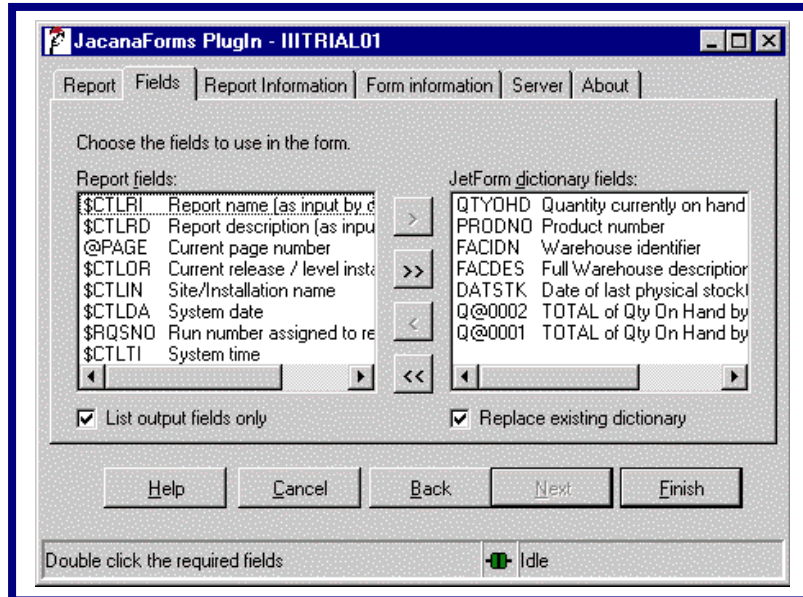
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Once the data to be extracted from the application has been defined, in an existing OPEN/DB report or a new report created in Jacana - OPEN/DB, the user can create the form layout using Design.

In Design, the JacanaForms Plug-In is used to connect to the OPEN/DB system on the iSeries-400, choose the report definition required, and choose the fields to be used in the form. The chosen fields are then automatically loaded into Design's data dictionary for use in developing the form.

Fields can now be dragged and dropped onto the form as required. The attributes of these fields now match those in the OPEN/DB report definition held on the iSeries-400, in terms of type, size and description.



The output will automatically be produced in the field nominated format suitable for Central to process. The e-form once complete will be moved to the Forms Warehouse on the NT Server.

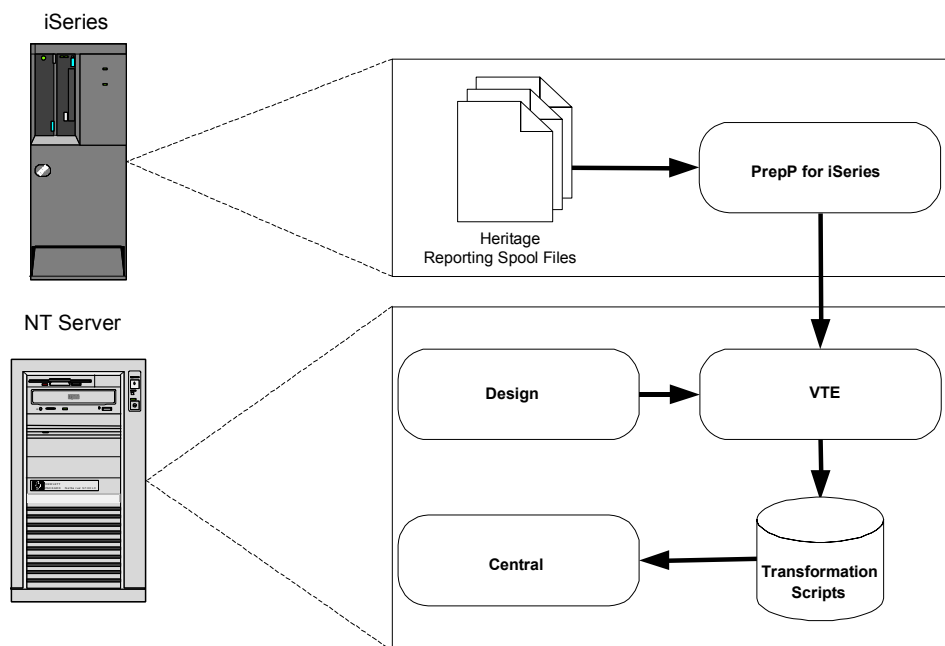
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Existing Reports – Use Visual Transformation Editor (VTE)

Visual Transformation Editor (VTE) is a powerful desktop tool that lets you easily create a Transformation script for a heritage report. VTE features point-and-click and lassoing techniques to simplify the mapping of the report data elements to the form created using Design.

VTE provides a bridge between the heritage report and the electronic form created in Design. Once the transformation script has been produced it will be run automatically each time the form, such as an invoice, purchase order or shipping document, is produced.

The VTE Schematic



The steps in this process are:

- Create an e-form using Design
- Identify the sample existing report and use PrepP for iSeries to download it to the PC desktop
- Use VTE to map the spool report's data elements to the electronic form.

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Data Merge And Printing – Central In Action

At the core of JacanaForms is the powerful data merge and formatting component – Central. At production time, Central takes the data, matches it with the appropriate form from the form warehouse and merges both components to produce the electronic form.

Central allows you to produce the right document, in the right place, at the right time and in the right format. Each page in a multi-part form can be printed on a different printer, for example, in the warehouse and in the finance department. One data stream can be used to output several documents such as printing an invoice, shipping documents and a credit/debit memo simultaneously. Documents can be printed remotely at different plants, each with a different look and feel. This means a single system can process data for a number of businesses / plants, yet still deliver the documents locally.

Central's powerful dynamic form feature enables the look and feel of each document to be controlled intelligently by the data. For example, a customer message section can appear or disappear, based on whether there is a message to print, allowing each customer to receive individual, personalized messages. Dynamic forms can also be used to allocate the amount of space on an invoice so that it grows to exactly accommodate the number of line items.

Central performs the process of merging the blank form template, created using Design, with the data, and converting it to the language of the destination output device.

Central supports a wide variety of printer devices, allowing you to leverage existing printer hardware. Almost any postscript or laser printer is supported including those from Hewlett-Packard, Xerox, Canon, Lexmark, Digital, Kyocera and Tektronix.

Special drivers are included to support printer features such as duplexing, tray selection and page orientation.

Central is NT server based, and provides electronic forms output services that process print tasks and manage the administration of electronic forms in a networked environment, enabling:

- Printing of form and data on one or more printers
- Flexible job management control of assigned printers
- Interpreting information from a single print task to present the information in different views on different printers
- Downloading of frequently used forms as macros to the printer itself for printing later, rather than sending the form for each print task

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- Loading and unloading macros in printers to make the most effective use of printer memory in those printers that support managed memory
- Managing the transmission of control commands to shut down, start, pause and resume printer operations
- Monitoring and logging the status for all activities whether complete, incomplete due to a problem, or in progress.

In summary, Central provides unattended print management

Central controls the automatic data merge of the report output (either from a heritage report or one created using OPEN/DB), with the form created using Design, to produce professional quality, laser printed documents. Central manages the downloading of forms to a printer, redirects output to a designated network printer and monitors the status of error logs to allow quick troubleshooting of problems.

Key features include:

- ***Intelligent pagination control*** - providing maximum control over the flow of information from page to page, controlling how data prints when the top or bottom of a form is reached.
- ***Inline text control*** – enables control over the appearance of data on the printed form including font type, font size, bold, underline, italics or superscript characteristics.
- ***Printer Support*** - print drivers to optimize printing speed. Custom print drivers for over 50 printers guarantees print speed three to five times faster than the standard OS print manager. Print drivers support HP PCL and Postscript Level 1 and 2 at 300, 600, or 1200 DPI with color printing on specific printers.
- ***Enhanced Performance*** - Flash memory, disk technology and form cartridges are all supported to reduce network traffic.

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PrepP for iSeries and PrepP for 29T Services

The 'polling' and forwarding services provided by PrepP for iSeries and PrepP for 29T ensure that JacanaForms operates automatically and seamlessly across the hardware platforms involved. Data and/or output are distributed as required by both the JacanaForms solution and the client.

iSeries-400 resident, PrepP for iSeries, monitors one or more iSeries-400 output queues awaiting the arrival of spool files matching predefined criteria, then automatically copies the spool file data from the output queue to an iSeries-400 folder.

Resident on a Windows-2000/95/98/NT server platform, PrepP for 29T monitors iSeries-400 folders for files matching pre-defined criteria. PrepP for 29T will automatically copy and transfer data from the iSeries-400 folder to the server directory used by Central. The polling uses the FTP protocol and therefore TCP/IP needs to be enabled between the Windows NT Server and the iSeries-400.

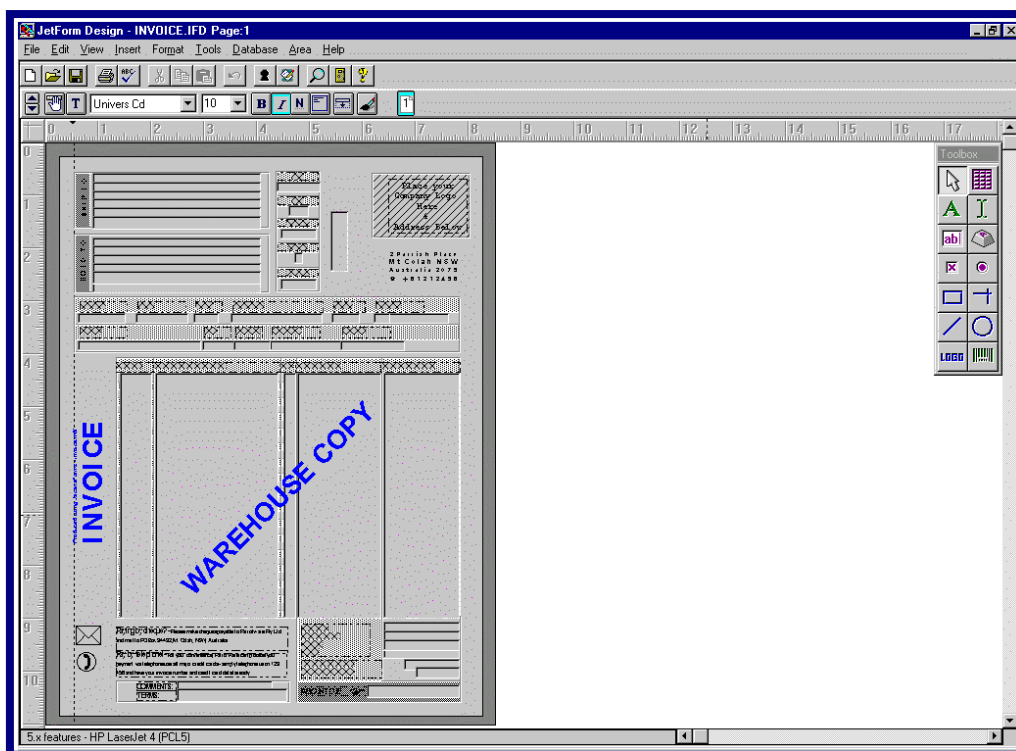
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Using Form Design

Design is a powerful graphical design and development tool for creating electronic forms.

Design enables electronic forms to be created that can be exact replicas of existing paper forms, for even the most complex forms. You can improve productivity and simplify form design tasks by storing frequently used form objects, or even entire forms, in the Forms Dictionary.

Once designed, forms are ready for use by Central.



Using a WYSIWYG approach you can see your form take shape as you draw it on the screen. All the features, such as text, fields, lines, boxes and logos and their attributes, such as fonts and shading appear on-screen as they will appear on the target printer.

Many features make it flexible to your needs. You may combine pages of mixed size and orientation; pages may be static or dynamic. A form may print on one or both sides of the paper, with or without collating.

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Design lets you incorporate graphical objects, such as lines, boxes, circles, and arcs. You can choose attributes such as line widths, line styles and shading patterns. The most popular graphic formats for logos, such as BMP, PCX, TIFF and WMF are supported, plus, barcodes can be printed in the common formats.

Sophisticated text formatting enables you to add text with different justifications and any mix of fonts supported by your printer. Design supports tabs, indenting, and style effects such as bold, italic and underlining.

Store the form objects or entire forms in the Forms Dictionary. This can assist form creation either through copying an existing form as the template or by incorporating commonly used objects in a new form design.

An Autotrace feature enables existing forms to be scanned into Design to provide an immediate outline design for the electronic form.

In summary, Design offers a complete set of design tools for professional looking forms, including:

- Storing forms in a Forms Dictionary to simplify and speed up initial design and modification.
- Toolbox including lines, boxes, arcs, and circles (of any width or thickness), text and text formatting, tables, check boxes, radio buttons, data fields and bar codes.
- User-defined grids for precise management of graphics and text.
- Full font support, shaded text, rotated text, variable leading.
- Multi-level zoom and pan.
- Support for the most popular graphic formats (e.g. for importing logos) including PCX, TIFF, WMF, Postscript, BMP and GIF.
- Test Form command enhances the design-compile-test cycle.
- Bar Code generation based on user input, with support for the most common bar code formats such as UPC-A, 2 of 5, 3 of 9, Code 128, Codabar, EAN 8 and 13, and postal (including US Postnet).

The completed e-form is held on the NT Server in a Forms Warehouse for use by Central.

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Using Bar Codes

Barcodes can be included as part of the form design or fields on the form can display as bar codes at print time. JacanaForms can print barcodes as a series of vertical lines of different widths taking care of converting the values into the required set of lines for the specified barcode type and configuration information.

Barcodes can be customised --- the seven elements of the barcode can be adjusted --- for example, adjust the width of the black and white bars to conform to the manufacturing tolerances of the barcode reader.

JacanaForms supports the following:

2 of 5 Industrial	UPC-A
2 of 5 Matrix	EAN-8
2 of 5 Interleaved	EAN-13
2 of 5 Industrial with Checksum	ZIP (US Postal 5 Digit)
2 of 5 Matrix with Checksum	ZIP+4 (US Postal)
2 of 5 Interleaved with Checksum	DPBC (US postal Delivery Point Barcode)
3 of 9 Large	Code 128 Set B
3 of 9 Medium	Code 128 Set B Large
3 of 9 Small	Code 128 Set C
3 of 9 Compressed	Code 128 Set C Large
3 of 9 with Checksum	UCC128-C Serial Shipping Container Code
Codabar	Code 128 Set C Medium (No text)

Bar codes can print on any supported printer, without additional hardware. Also supported are thermal transfer printers from Zebra, Intermec, Datamax, TEC and Monarch.

Using JacanaForms For Check Applications

There are a number of advantages to producing checks in house, including:

- Using blank check stock reduces costs and lead times and unlike with normal continuous pre-printed stationery there is no wastage should address or bank details change.
- There is no need to securely store any check stationery before printing as it is blank and carries no MICR line until after the printing process.
- JacanaForms uses the application's output file(s) so no expensive changes are required to application software.
- If required, laser signatures can be applied to checks dynamically, according to such criteria as: authority levels, bank accounts, check number ranges, or indeed any other criteria specified by your organization.
- Checks and remittance advices no longer need to be printed onto separate paper stock. JacanaForms can be set-up to print the check and corresponding remittance advice together.
- The presentation of checks produced through JacanaForms will benefit from quality HP LaserJet printer output.

While it's true that MICR is, in it's most simple definition, only a special font (E13-B) and a magnetic toner, in practice it is a very precise process with a complex set of variables which must satisfy various Bankers' Associations and clearance house requirements before implementation.

The MICR dedicated printer can function as a normal LaserJet to handle non-MICR applications, with the MICR accessory options fitted just for the check processing run. The "MICR mode" personality is activated within the printer by a proprietary escape sequence embedded into the beginning of the data stream. "MICR mode" once activated will look for the installation of MICR toner. The "MICR mode" operation automatically sets printer density variables to ensure the best MICR font reproduction and changes the printer's operation to process MICR encoded documents.

In creating check output, consideration needs to be given to:

- Type of printer to be used --- is it suitable for MICR?
- Design and sign off requirements of the Bank
- Specific security requirements concerning the location of the printer.

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FEATURE – BENEFIT OVERVIEW

<i>Easy to use WYSIWYG forms drawing tool -</i>	No programming required to create forms. Easy and inexpensive to maintain using existing staff
<i>Extensive forms processing capabilities</i>	High quality professional forms output exceeding comparable pre-printed forms - (graphics, bar codes, logos, watermarks, rotated text, multi-part forms)
<i>Bar codes done in software</i>	Print bar codes on any supported printer – no special hardware required
<i>Intelligent dynamic forms</i>	Create market-focused, personalized messages on customer documents
<i>The look and feel of each document can be dynamically controlled by the data</i>	Automatically allocates space on an invoice to exactly accommodate the number of line items - Save paper and improve the appearance of printed documents. Make documents easy for customer to read and process
<i>Accepts a single plain ASCII data stream</i>	Enables simultaneous output of several types of document in multiple formats from a single data stream e.g. invoice and packing list and credit memo
<i>Flexible printing options</i>	Customize and print documents locally at remote plants or subsidiaries using different logos, terms and conditions without impacting application development
<i>Data stream sent across the network contain only data, no formatting -</i>	Network traffic is reduced
<i>Forms and logos are stored on the server</i>	Reduces the amount of data transferred across the network
<i>Print drivers are 3-5 faster than operating system print drivers</i>	Fast forms printing
<i>Support printer features such as duplexing, tray selection, flash RAM -</i>	Leverages existing hardware and reduces network traffic
<i>Integrates with OPEN/DB report writer</i>	Enables the fast creation of new outputs for use with e-forms