

Create!form® for JD Edwards

Design and Deliver Custom Documents from Your Oracle® JD Edwards Application Output

The Create!form suite - featuring Create!form Designer® and Create!form Director™ - is a powerful, next-generation e-forms solution for formatting, personalizing and delivering JD Edwards application output. A true enterprise-class application, Create!form converts JD Edwards application output into more attractive, functional and efficient electronic documents, then intelligently distributes them over a variety of delivery channels including print, fax, email or the Web.

Create!form Designer for Advanced Document Composition

Create!form Designer works hand-in-hand with the JD Edwards Report Design Aid (RDA) or Enterprise Report Writer, enabling users to quickly compose custom e-forms for EnterpriseOne, OneWorld and ERP 8.0's native PDF output. Create!form Designer adds conditional intelligence to PDF output structure, allowing forms to be designed without extensive scripting, complex designs or conversions. Using a sample PDF report generated by the JD Edwards-supplied Universal Batch Engine (UBE) as a template, positional document data, sectional data and metadata is available for use instantly. No tedious configuration or mapping is needed. Using Create!form's interface, data can be altered and repositioned in seconds without changes in the RDA. From within a report section, simply select the variable data in the report and then drag it to a new position. Instantly change the font, size, justification and color of the variables, convert variable text into a barcode or add MICR font for check printing.

Create!form Designer Features

Tightest PDF Integration - Provides instant access to embedded metadata, sectional information and the important positional document text in the JD Edwards PDF output file for design in one easy step.

Live Preview - As data is mapped from the source file to the new document, Create!form automatically displays the new content live on the screen, including all customized elements. To save time and streamline form design, users can scroll through the source file sample and see instantly how the varying data affects the custom output.

Design Templates and Forms Library - Create!form Designer comes standard with a variety of sample form projects. These templates can be applied directly to standard output to streamline form design and composition.

Barcode Insertion - As a standard feature, users can implement barcodes in purchase orders, inventory pick slips and other documents. Choose from a variety of barcode standards such as Code 39, UPC, EAN, Code 2 of 5 and 128, along with two-dimensional barcodes, including PDF 417 and MaxiCode. Barcodes may be assigned as a static value or can derive a value from variable data within the host application output or an ODBC database. Create!form automatically calculates the associated check digits, guards, and start and stop codes.

Reformat, Personalize and Automate Documents Including:

- Invoices
- Account Statements
- Purchase Orders
- Checks
- Remittance Advices
- Pick Slips
- Bills of Lading
- W2s & 1099s

Why?:

- Improve the quality of customer and supplier communications
- Manage JD Edwards output using in-house resources
- Replace pre-printed forms
- Automate payment decisioning
- Augment customer service levels

Conditional Design Logic - Allows users to manipulate report data and personalize document output formatting based on specific audiences and delivery preferences. Data may be added or suppressed, and design elements, including logos, site addresses and marketing messages can be customized by recipient, all without requiring changes to the original output.

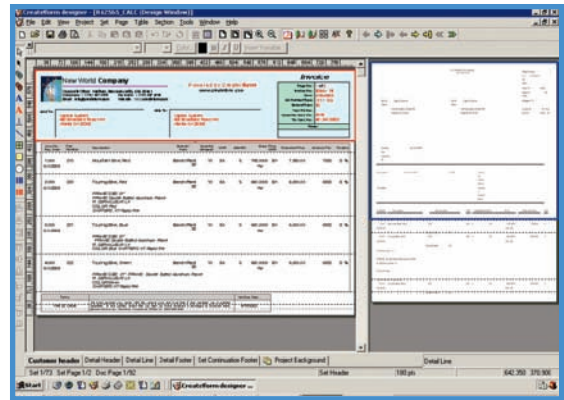
Variable subforms can also employ conditional logic. Subforms can be created and dynamically linked to any number of master forms, and are typically employed for frequently used information such as logos, addresses or signatures. When the time comes to change an address, fax number or logo, simply update the shared subform and all linked output is instantly updated.

ImageServer Utility - Working directly with the Variable Subform function, CreatelForm's ImageServer utility automatically converts .jpg, .gif and .tif files into CreatelForm subforms, ready for dynamic inclusion in formatted documents. The new utility streamlines the process of adding items such as product images, scans and signatures into documents.

Document Repagination - Dynamically adjusts document length by repaginating output based upon incoming data. This feature reduces the total amount of document pages required to print, leading to reduced costs for toner, paper and other handling tasks, as well as reduced file, email attachment and archive sizes, and reduced fax delivery charges. Document repagination functionality includes:

- Automatic processing and accounting for repeating line-item data
- Document set-based repagination
- Autosizing of page sections to minimize excessive white-space

ODBC Look-up Variables - Assign look-up variables from within CreatelForm Designer to add data directly to the document, minimizing the need to modify the original JD Edwards output. Look-up variables leverage ODBC to access local or networked databases, and can also be used in conjunction with the user variables functionality. Simply name the variable and indicate which field will be pulled from the database. The variable can be inserted anywhere in the document.



Electronic forms are designed by drawing the custom form right over the JD Edwards output. Furthermore, with CreatelForm Designer there is no need to drag-and-drop each and every variable onto the page as with traditional design tools.

Intelligent Tables - Bottomline's intelligent table capability allows the sorting of line-item output by product number, product name, weight or another specified data variable without making changes to the application, as well as dynamic sub-totalling on page breaks and groups, capabilities that enable both internal and external users the ability to search for and find documents.

Data Calculations - Use CreatelForm Designer's expression builder and user variable functions to add data calculations to document output. Perfect for items such as page sub-totals in repaginated documents, tax rate conversion and more.

MICR Check Printing - CreatelForm Designer lets users accurately map and output Magnetic Ink Character Recognition (MICR) data, allowing users to eliminate the use of costly pre-printed check stock using the optional Create!micr™ module.

Date and Data Format Controls - Configure documents to automatically generate output with customized date, numeric and currency formatting.

Flexible Project Formatting Controls - The Page Style Rules feature enables users to create event tables for page types including first page, continuing page, last page and more. Background forms can be added instantly for fast and easy OMR mark formatting.

PDF Proofs - A merge preview feature lets users create PDF "proofs" of final document output from within CreatelForm Designer. Forms appear exactly as CreatelForm images on a printer or as an archived/emailed PDF document.

“Now, designing forms is a snap. Today a form takes just two days from design to testing, so we can react to customer requests for revisions or additions on the fly.”

Keith Neely, Director of Information Technology
Mizuno U.S.A.

Optimized Forms Management - Custom forms are automatically named by Create!form Designer during the composition process to match the report number and, optionally, all or part of the version number of the EnterpriseOne, ERP 8.0 or OneWorld PDF report.

Additional features of Create!form Designer include a project wizard, built-in object alignment tools, a spell checker, thumbnail and multi-page document previews, date and data format controls, project/data trees and more.

Create!form Director for Automated Document Delivery

Create!form Director is the root application for users to define the desired transactional document and process workflow of their JD Edwards output. Using this solution, organizations can significantly improve the efficiency of their business document distribution, converting manual distribution processes into automated electronic processes.

Create!form Director enables administrators to define, route and deliver documents to their point-of-need for automated printing, faxing, emailing, archiving or electronic payment. The easy-to-use tool set helps users configure rules that trigger the splitting of a single, large spool file into numerous documents, extract data from documents for other applications to use, and distribute documents to multiple queues and locations without modifying existing software.

Create!form Director Features

Intuitive Interface - Windows-based interface for configuring, routing and processing documents. No complex coding required.

Visual Workflow Variable Mapping - Access visual document variable mapping from within Create!form Director for streamlined process modeling. No need to rely solely upon row, column, or depth data, or to switch between applications.

Point-and-Click Expression Building - Replace time-consuming manual coding within your document formatting and handling application with simple, point-and-click expression building.

Output Destination Management - Direct multiple copies of documents to email, fax, archive or networked printer(s) according to document content or other user-definable business rules.

ODBC Look-up - References external databases for document-specific delivery parameters, including delivery preference, email/fax addressing, account information and contact details.

Document and Data Handling Functions

- **Split** spool files according to user-specified rules or variables, such as invoice number, check number, state/province, country or other data variables.

- **Deliver** collated or uncollated documents to the same location or to a secondary one. For example, archive copies of invoices on the finance server, while printing copies of payment records on the personnel printer.
- **Distribute** split or copied documents to any output queue based on conditions within the data: direct pick slips straight to the warehouse or deliver historical documents to the archive.
- **Sort** and reorganize documents for more efficient distribution.
- **Transform** input data into any ASCII-based output format (i.e. ASCII, CSV, XML, HTML, etc.) from within Create!form Director. Use this feature to create and deliver data to databases, assemble detailed audit reports, print to line printers and export data to other applications.
- **File manipulation** functions allow temporary files to be created, renamed, moved and deleted. This can be used to carry data over separate jobs and to create temporary files for validation and error handling.
- **Send** output directly to ftp and http destinations.
- **Database Updates (Optional)** - Defined Create!form workflow can include the addition and modification of application databases via ODBC connection using any defined data or user variable. The database update feature is ideal for applications requiring address verification, mail sorting, audit databases and data carried over separate print jobs.

Create!form Server and Output Destinations

Runtime Operation - After form design is completed and logic is added to each document using Create!form Director, the project is transferred to the Create!form Server using the Tools/Transfer menu within Create!form Director. Create!form Server can run on any Windows 2000/2003 server and handles all job requests sent to the printer queue as a back-office operation. When the report is submitted by EnterpriseOne, ERP 8.0 or OneWorld's UBE, Create!form Server automatically merges this PDF report with the custom form according to its report and/or version number. An efficient and effective "traffic cop," Create!form Server determines where your Create!form-enhanced application output will be delivered based on user-defined rules. Create!form supports output from OS/400, UNIX, Linux and Windows enterprise servers.

Seamless integration with the Windows spooling environment allows direct access to the print queue properties and document handling options. Documents in error are held on the print queue, and can be restarted once the problem is identified and corrected.

Create!form Acrobat Plug-in - As a standard feature, Create!form includes a special plug-in for use with Adobe Reader/Acrobat on any supported JD Edwards client (Windows, Terminal Server/Citrix, and HTML/Java), allowing you to merge your PDF reports online with the custom e-forms you have defined as either a manual or automated, back-office function.

Post-Runtime Features

Reprint Management - Once your output has been generated, a built-in reprint management utility lets you search, select and reprint documents on the same physical printer, or on a different printer entirely. Document life span is defined by the administrator, up to 30 days. Standard document reprint options include search, view, reprint, redirect, pause, resume and cancel.

System Maintenance - Upgrades, modifications and maintenance can be performed centrally on the server and changes can be implemented immediately. For extensibility and increased throughput, multiple queues can be configured to increase performance. In addition to available development licenses, administrators have the option of using a different output queue to test scripts before deploying to the production directory.

ERP Migration Protection - The Create!form authoring suite helps your organization manage data and application changes with the simple creation of new data maps to suit the new application output, ensuring the rapid migration of existing Create!form documents. Bottomline is the only document process automation vendor to be certified for JD Edwards EnterpriseOne, JD Edwards World and Oracle applications collectively.

Output Destinations

Create!form, including its Designer and Director interfaces, enables personalized output to be automatically distributed via a number of advanced delivery methods. Each destination is modular: simply choose the modules that your organization needs today and add-on as your requirements change. Create!form output destinations include:

Transactional Document Modules

- **Create!email®** - Emails document output automatically to recipients in real-time as a PDF attachment, embedded PDF hyperlink or email body text.

- **Create!fax®** - Integrates with fax server software to deliver documents to a fax destination, using fax numbers retrieved from the base document or an external ODBC database reference. Cover sheet content can be personalized by recipient.
- **Transform™ Content Center** - A Web-based digital archive of all your final documents, including full indexing and secure, online self-service search and retrieval.

Transactional Payment Modules

- **Create!form ACH** - Provides secure, NACHA-compliant, electronic payment transmission for business-critical vendor and employee payments.
- **CheckDefense™** - Advanced Positive Pay technology protects your MICR check printing environment from check fraud.

System Requirements

For complete details on the hardware and software platforms required and supported by Create!form, please call 800.472.1321 (option 2) or email info@bottomline.com to be connected to a representative in your region.



Corporate Headquarters

325 Corporate Drive
Portsmouth, NH 03801 USA
tel 1.800.472.1321, +1.603.436.0700
fax +1.603.436.0300
email info@bottomline.com

Europe, Middle East, Africa

115 Chatham Street
Reading, Berkshire RG17JX UK
tel +44.118.925.8250
fax +44.118.956.9990
email emea-info@bottomline.com

Asia-Pacific

12-14 Cato Street, Suite 206
Hawthorn East, VIC, 3123 Australia
tel +61.3.9824.6888
fax +61.3.9824.6866
email ap_info@bottomline.com.au



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