

# Transform 8.2

Bottomline Transform bridges the gap between native ERP reporting document design and management, and modern organisation's document capture, storage, workflow, fast communications and compliance, low cost, high quality business document creation and production.

Reduce the costs and time to implement and maintain document processes

First class customer and supplier communication experience

Unlock information in your documents for maximum visibility and control

Extend digitised workflows beyond your EPRs boundaries

Automate document compliance and auditability to meet legal requirements

Enhanced security and control for robust processes and information leak prevention

### **DOCUMENT OUTPUT MANAGEMENT**

Clear and concise brand quality communications at every customer touch point



### **STORAGE & ARCHIVE**

Automate regulated documents compliance and gain maximum business value from your documents



### **ENHANCED INFORMATION CAPTURE**

Automate capture of information from documents forms and external services



### **VISIBILITY & CONTROL**

Real time dashboards and reporting with controlled access to information enhancing business insight



### **ENHANCED BUSINESS PROCESSES**

Reduce costs and driver efficiency through enhanced information access and document interaction



### **ENHANCED CUSTOMER EXPERIENCE**

Interact with customers and suppliers when, where and how according to preference

## **Maximise the value of your business documents**

Transform has been designed to expand to match your organisations Document Management requirements as they evolve, many businesses start with the aim of simply reducing the costs of producing and maintaining required business documents, but quickly extend their requirements to achieve significant efficiency gains and competitive differentiation.

- Reduce the time and cost to produce documents
- Reformat and repaginate your documents for maximum impact
- Distribute printed and electronic documents to point of usage
- Merge and synchronise information between systems
- Embellish reports with barcodes for simple receipt tracking or labelling
- Automate the delivery of all outgoing correspondence
- Publish using print, PDF, fax, email, repositories, electronic data
- Reducing compliance exceptions and operational overhead
- Ensuring process continuity, with document tracking beyond borders of your organisation
- Maximising business insight through controlled sharing of information and documents
- Increase business response times through automated document and form data capture
- Promote viability and control with real-time dashboards and reporting
- Enhancing communications to gain customer and supplier preference

## Transform Architecture

For the simplest of implementations, all major components of the software can be installed on a single server. Transform is frequently deployed in a multiple server environment to accelerate system throughput, reduce latency and manage disaster recovery.

It is also common for administrators to separate their live and test/development environments, whereby Output-Projects are first developed and deployed into a development environment, then promoted into a UAT environment for user testing, before finally being promoted into a "live" multi-server production environment. Transform comes with administration tools which ease moving projects between environments, and carry out checks to ensure all required resources, fonts etc. are in place to ensure a smooth transition.

Transform may also be implemented in Disaster Recovery and Virtual Disaster Recovery environments.

## Transform User Personas

Transform gives organisations the option to decentralise document management away from the IT department to take advantage of specialist design skills and knowledge to deliver effective communication with maximum efficiency. Separating responsibility for activities also builds in a level of security and control, to eliminate the possibility of a single user either accidentally or maliciously exporting proprietary or sensitive information without authorisation. There are three roles required which can be managed by your IT, departmental stakeholder or collaboratively as required.

### ADMINISTRATOR

The Administrator will mostly use Transform to manage Output-User-Privileges and Output-Devices. They will also use the Synchroniser to move Output-Projects between the Designer and the Deployment Server which is used to manage test/production environments and manage system performance issues.

### DESIGNER

The Designer is used to set-up output content and layout and select available Output-Devices. This can be carried out either individually or collaboratively by technical staff, specialist design teams or individuals with specific organisational function knowledge.

### USER

The user will run pre-defined batch or adhoc reports from within the organisations ERP as required to produce their required output. Transform will be transparent to users and feels identical to running a standard report.

## DESIGN



### CAPTURE

Forms, Fax, Email, Scan



### EXTRACT



### ROUTE



### INTERACT

Approve, Enter, Retrieve



### GENERATE



### CONTRACT



### PUBLISH

Print, Email, Fax, Repository



### TRACK

## Transform Core Components

- ERP Connectors
- Synchroniser
- Deployment Server
- Runtime Server
- Designer
- Precision Form API Service

### ERP CONNECTOR FOR D365

Bottomline's connectors seamlessly link Third party systems like ERPs and CRMs to the Transform Document Management suite. Users will be unaware that the connectors intercept reports to creating the XML data feeds for downstream processing of forms and reports. From a designer or administrators perspective this simplifies data generation data required for reports by using a graphical interface; it can also manages the relationships and links across multiple data tables.

### SYNCHRONISER

Bottomline's Synchroniser joins the Output-Project design process to the Output-Production process, allowing collaboration throughout the Document Output Management process between design, technical and user functions. The Synchroniser is used by the Administrator or Designer to create a repository and package structure and deploy projects to Runtime Servers. It can be accessed from within Bottomline's Designer or as a standalone program.

### DEPLOYMENT SERVER

The Deployment Server is at the heart of Transform. It contains the master copy of all projects and files that are installed on Runtime Servers. The Deployment Server holds and manages the license keys for each component of the software and serves as the management interface for each Runtime Server registered to it.

The Deployment Server requires user authentication in order to connect a 'client' session, and in so doing it allows for the enforcement of access rights to ensure full control of project changes.

Deployment of projects can be scheduled to suit specific operational windows to minimise disruption to the production system.

Detailed logging information for each project that makes up the solution is available via the Deployment Server's Administrator Interface. This allows the status of each process to be monitored and any issues to be addressed.

#### Deployment Server functions

- View the status of the Runtime Servers associated with the Deployment Server, start and stop the servers and view branch log files.
- View and search all server log files and events, and export the log information to text or XML data files.
- Add and remove Runtime Servers, start and stop servers, manage the Package Watch List, view currently running processes and configure the server.
- Configure the Deployment Server, backup and restore the Deployment Server's repository, configure server and process groups, and set timed deployment.
- Upload and remove license keys. Configure which users can access packages within the Deployment Server's repository on a per-package and per-user basis.
- Display users, add and remove users, and set user permissions.
- Search Requests.



## RUNTIME SERVER

Bottomline's Runtime Server resides on the application servers used to execute the projects deployed via the Deployment Server. The Runtime server generates and distributes output to target output devices in the desired output format.

Transform can be made highly scalable by deploying multiple Runtime Servers on multiple devices for large-scale, enterprise wide implementations. In a multi-Runtime Server setup, each server can be configured to execute a specific set of projects in order to achieve segregation of duties, or else projects may be shared between multiple servers to give load balancing capabilities.

### **Runtime Server allows you to:**

- List the processes on a Runtime Server and start or stop processes.
- List packages that have been uploaded to the Deployment Server, and add them to a Runtime Server's Package Watch List.
- Add a Runtime Server to the Deployment Server's list of registered Runtime Servers, to bring it under the control of the Deployment Server.
- View the deployment status of registered Runtime Servers.
- Configure server contact settings. If your Runtime Server license allows, specify whether the Runtime Server is permitted to run while disconnected from the Deployment Server, and if so, for how long.
- Locate branch files that can function as Web services, and view the information that can be used to call them as Web services from external applications.



## DESIGNER FEATURES

Bottomline's Designer enables the rapid creation of document Projects that address the whole document lifecycle. Once created and tested projects are passed to the Deployment Server for document output management. The Designer has been developed with 45 years of market experience and the feedback from our 9000+ customers. The result is a solution full of productivity tools that help you turn documents into your competitive advantage.

The Designer has a familiar Windows style interface that facilitates document design, creation of delivery logic, user interface design and the construction of process flows. Using assistants and wizards to guide the user through otherwise complex tasks, reduces development time.

Process workflows and user interfaces are created in the same graphical environment. With only one design tool to learn, users can also build solutions for mobile devices and improve your business communications without costly changes to other applications.

### **How Designer enhances report design:**

- The Designer facilitates quick mock-ups reducing the need for formal specifications by providing better quality feedback on your design.
- Document layout is augmented with real data so you see what each page will look like as you are designing it.
- Using the same tool to build both presentation and delivery logic allows the content and document structure to be easily changed depending on the delivery destination.



## DESIGNER FEATURES

- Microsoft XPS import enables rapid document creation from templates of other windows compatible form-generating software eq. other ERP systems, word, excel etc.
- Expression Editor enables fast rule based logic creation for targeted communications.
- Delivery assistants and other productivity aids, speed-up development.
- Projects can be deployed across the globe.
- Complete image, font, and barcode support for documents.
- Object orientated process flow tool that makes complex tasks simple.
- Rich text boxes for true personalisation of correspondence.
- Dock-able windows for multi-screen cross application development.
- Automatic support for international output.
- International spell check to remove errors and reduce sign-off times.
- ASCII and Unicode support for global projects.
- Grids, alignment and other layout aids to speed up repetitive tasks.
- Comments and debugging tools to enable modular development.
- Real time pagination tools to reduce document sizes.
- XPS generator for preview and sign-off.
- Deliver collated or un-collated documents to multiple locations using a single process.
- Configurable OCR tools to create inbound solutions.

## TRANSFORM OUTPUT FEATURES

Transform adds a whole new dimension to your ERPs output capabilities, making it simple to manage a vast array of output devices and destinations without Programming skills. Transform allows you to:

- Deliver output to any number of printers or users.
- Support all printer types with Windows drivers, including full colour devices.
- Support of special usage devices such as label and impact printers.
- Email documents as PDF's, HTML, MHTML (email) or in their native form.
- Create rich content.
- Integrate with most Fax servers.
- Output data in a wide variety of formats including (i.e. ASCII, CSV, XML, HTML, etc.)
- PDF Options:
  - » PDF/a generation for archiving or PDF/x for production printing.
  - » Accessible PDF creation.
  - » Encryption and password applied to PDF files for added protection.
  - » Advanced Digital Signing of PDF documents for authenticity of origin.
  - » Create Hotlinks to help navigate within PDF files and to external content.
  - » Compliance with WGAG and ADA legislation.
  - » Embed data into PDF files including invoices.
  - » Create interactive PDF forms for improved data capture.
  - » Call web services to deliver or receive document data.

## PRECISIONFORMS DATA MANIPULATION FEATURES

Transform has powerful data manipulation tools which allow you to transcode data from a wide variety of data services, and enrich the content of reports for enhanced output or rule processing without the need for programming. This powerful capability is particularly useful in complex distributed IS infrastructures that call on a variety of data services from multiple suppliers.

- Split Microsoft Dynamics report files into multiple Projects according to pre-specified rules or variables such as Invoice Number or location.
- Split or copy documents for delivery based on conditions within the data.
- Sort and reorganise documents within a job by customer or vendor, for more efficient distribution.

Enhance report content using database lookups, or insert/update database records via ODBC connections using variable data from your report.

### Optional Components

As implementations develop beyond basic output management there are a multitude of opportunities available to enhance your overall implementation performance and extract more value from your business documents – these include:

- PTX Connect
- PDF Forms Packs
- PTX card Payments
- Transform Content Center
- Transform Connect
- Transform Active Capture
- Transform Web Process Pack
- Transform Audit Pack

## PTX Connect

PTX Connect is a collaborative, cloud-based service which allows you to track document communications outside of your organisation to ensure continuity of business processes. It also securely manages the delivery, storage and presentation of your financial documents with intelligent analytics which give visibility into undelivered and un-actioned invoices that can negatively affect your cash flow; and provides insights, data and trends that can help drive real time decision making. PTX Connect can be configured within minutes and will instantly transform your customer communications and unlock the value in your financial documents, helping you create innovative solutions, win.

- Provides an audit trail of every action and interaction made with each document
- Intelligent analytics provide real-time insight of all documents
- Highlights cash at risk and encourages a proactive approach to cash collection
- Reduces your Day Sales Outstanding (DSO) by getting paid quicker
- Saves time, reduces costs and optimises working capital
- Provides an easy, electronic way to keep track of your invoices and other documents
- Works with other Bottomline products easily, with no upgrades required
- Complies with HMRC guidelines for the distribution and storage of electronic invoices
- Modular and scalable - pay only for what you need

## PDF Forms Packs

Forms are one of the most common ways to capture information from customers and suppliers, but despite their simplicity and accessibility, until now they have failed to deliver the customer experience demanded by modern users. Bottomline's Transform PDF Center allows you to customise forms for individuals removing irrelevant questions or prefilling data you believe you already know to improve the customer experience. You can then electronically capture information, eliminating the need to key and scan completed forms when received, so you can deliver a better, more responsive customer experience and streamline your back office processes.

- Personalised digital Forms for a better customer experience
- Enhanced organisational workflows
- Enhanced security, visibility and control

## PTX Card Payments

Bottomline's Transform PTX Card Payment makes it simpler to make payment requests and collect payments through email or PDF documents, including invoices, quotations, repeat transactions, and payment reserves for greater efficiency, faster payment and enhanced auditability.

The 'PTX Pay Now' button allows customers to make secure immediate payments for a specified amount, via most common payment cards in a range of currencies.

- Simple and secure payment requests and collection
- Convenient customer payment
- Extensive payment choice

## Transform Content Center

Transform Content Centre document repository, is a powerful extension to the Transform platform. It's fully scalable, and permits automated filing, sharing and communications of financial documents with enterprise class access control. Revolutionise how you manage your financial documents, maximising the value you draw from them and deliver a first class user experience for employees, suppliers and customers with:

- Transparent document compliance
- Data sharing and collaboration
- Enhanced customer and supplier communications
- Visibility, insight and control
- Single Sign On (SSO) with Okta and Azure AD

## Transform Connect

Big data promises new customers, better experiences and new revenue streams. With pervasive compute and connectivity everything and everyone creates a digital footprint. Transform Connect removes the barriers of bringing your information together, to harness its full value and provide great insight when it's needed. Transform Connect standardises how you automate movement of digitalised information between on premise, web-services, machinery and data feeds; with the agility and security your business needs.

Transform Connect will change the way you think about delivering digital information throughout your organisation, enabling you to respond faster, to more requirements and with less resources:

- Standardise data integration
- Easy to use
- Secure enterprise class performance
- Agile data transformation and manipulation



## Transform Active Capture

Removing paper from business processes can improve efficiency by 300%. Therefore it makes perfect business sense to capture the content of business critical paper documents as quickly as possible.

Transform Active Capture (TAC) does exactly that, allowing you to scan invoices or other business documents and extract important data from them, reducing manual keying tasks, increasing capture accuracy and ensuring you achieve improved efficiency from your business processes.

- Choose between header data extraction or detailed line level capture
- Reduce invoice capture time and costs
- Remove unnecessary paper from your processes
- Increase capture and matching accuracy
- Minimise repetitive manual keying tasks

## Transform Web Process Pack

Transform Web Process Pack enhances the benefits that Transform Content Centre delivers by improving the digital experience for users with a superior self-service interface into the document repository that can be fully branded and customised.

The web-based portal allows internal and external users to work more efficiently with documents in a fully secure environment. Transform Web Process Pack simplifies how documents are managed and accessed by users, customers and suppliers.

- Enhance productivity and digital experience via the self-service portal
- Aggregate and present relevant data for better business decision making
- Improve visibility and control over customer and supplier communications
- Manage internal and external workflows for greater agility and efficiency



Contact us for more information on Transform 8.2

**CONTACT US**



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### About Bottomline

Bottomline® makes complex business payments simple, smart and secure. Corporations and banks rely on Bottomline for domestic and international payments, efficient cash management, automated workflows for payment processing and bill review, and state of the art fraud detection, behavioral analytics and regulatory compliance solutions. Thousands of corporations around the world benefit from Bottomline solutions. Headquartered in Portsmouth, NH, Bottomline delights customers through offices across the U.S., Europe, and Asia-Pacific.

For more information, visit [www.bottomline.com](http://www.bottomline.com)

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