

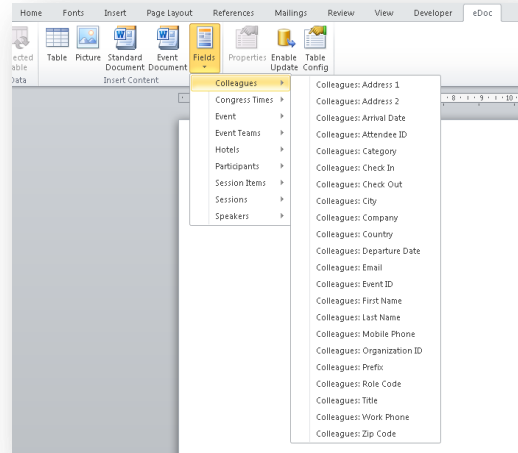
eDoc – Document Generation Suite

eDoc Suite is a set of Microsoft Office add-ins for Word, Excel & PowerPoint that lets you use your data in MS Office with ease.

Creating simple flat tables from data sources is possible in MS Office, but complex data integration (master-detail or from multiple databases) requires custom development or macros. Even then, flexible automatic formatting is difficult. The eDoc Suite allows you to integrate and present complex data intuitively without writing any code.

You can use the eDoc Suite with or without SharePoint and create complex tables in your Office documents using **data lists** from the following sources:

- SharePoint Lists & Libraries
- Web Services (ASMX, SVC & REST)
- Relational Databases



Our solution helps to reduce the effort required in the document creation and management process. Accuracy of content is greater compared to manual document creation, while formatting issues and time costs are dramatically reduced.

The Challenge

Every organization has business data available in a number of databases & systems. This data is normally available through reports and web dashboards, but it is difficult to access and use this data directly from within Microsoft Office Documents.

Users are forced to manually create excel tables and/or copy paste data manually into

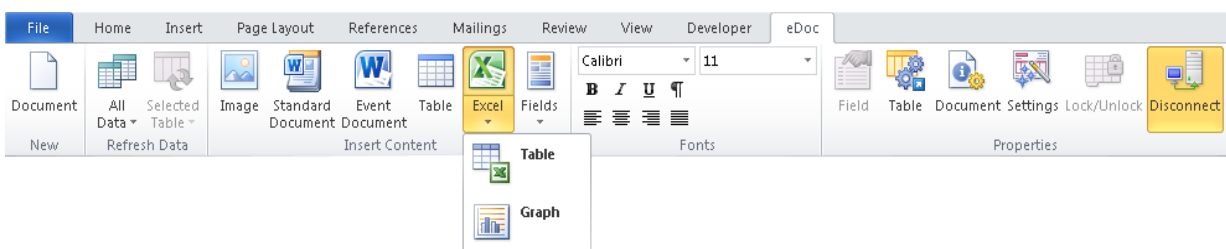
documents and presentations. Obviously, when the data changes, the documents are no longer correct.

Also, while Excel tables are useful for creating flat lists, they are not very effective when dealing with master/detail datasets and where formatting flexibility is needed.

The Solution

eDoc Toolbar is your solution for creating freely formatted documents combined with

complex tables based on data from various data sources. You can source your data either



directly from databases, from SharePoint or from web services: we call these data sources **data lists**.

You can use a combination of Excel tables, Excel Graphs and complex master/detail Word tables with flexible formatting. You can even create a master table from a data list from one database and a nested table, linked to the master, from a

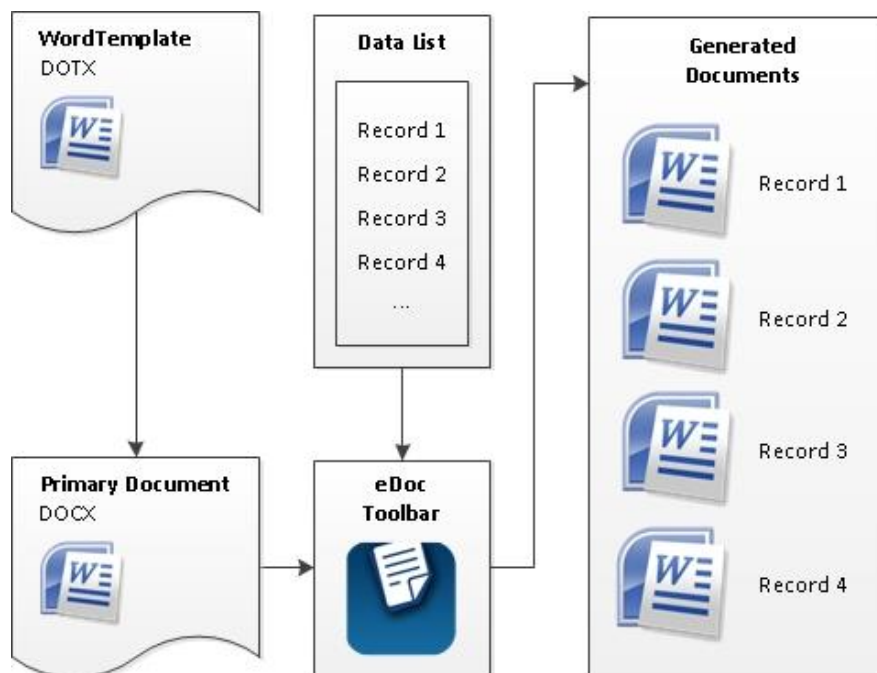
data list coming from a completely different database.

And that's not all, the eDoc Toolbar takes care of the content sync as well. You can set your data update options to automatically update the data list content whenever you open the document or with one click of a button; the eDoc Toolbar does the rest.

Generate Your Documents in A Few Steps

Generating data connected documents has never been so easy.

You can create your own document for individual use (and share it with your colleagues or clients) or you can create a document template and use it for generating **personalized** documents just like Mail Merge.

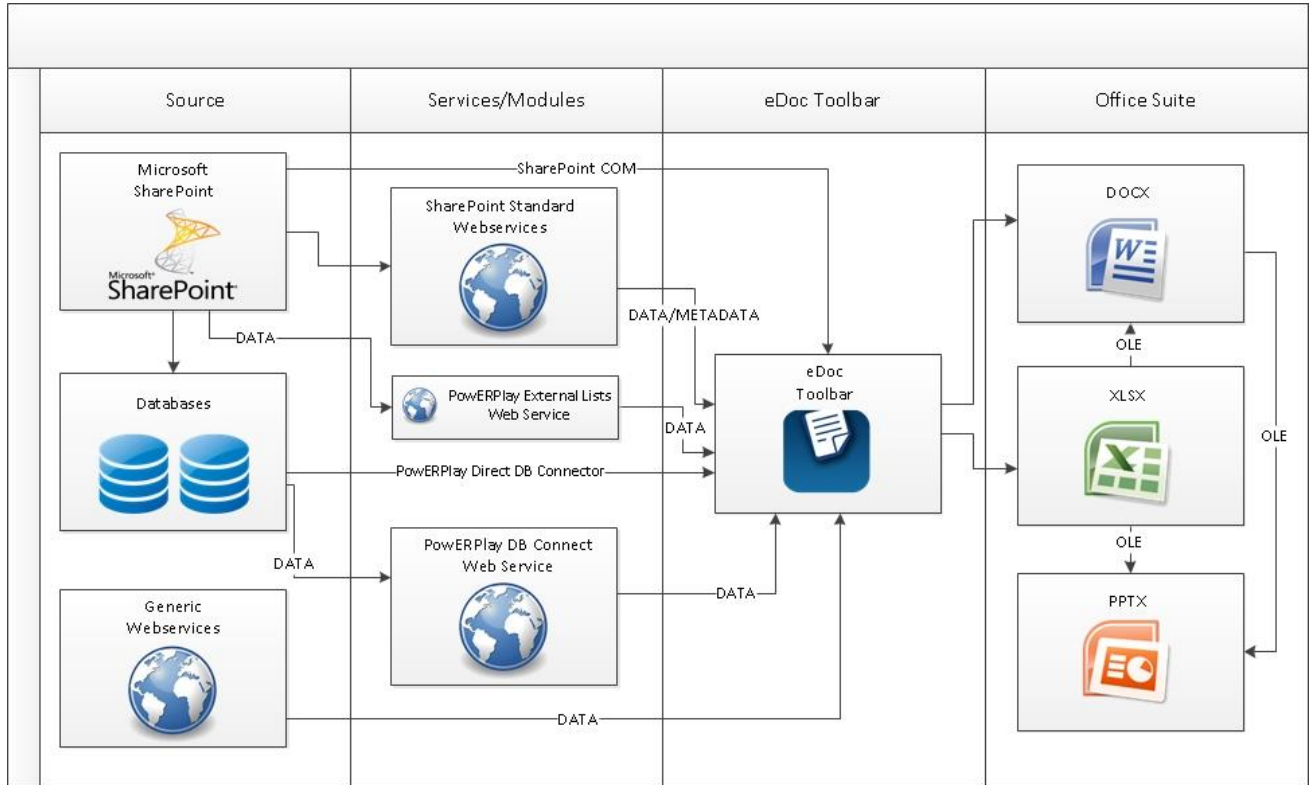


Benefits of using eDoc Suite

- Time efficient in generating large documents
- Always gets latest data / information in documents
- Enables hassle- free document updates using configurable auto data sync
- Uses custom document templates, meaning documents are consistent in terms of data, formatting, and styling.

eDoc Suite Components and Options

The eDoc Suite is comprised of 3 Microsoft Office Add-ins and optional utilities. You can license the full suite or the individual components depending on your needs. The suite is also available in 2 different editions (Standalone & Enterprise)



eDoc Word Add-in	Adds the eDoc Toolbar Ribbon in Microsoft Word. This can be installed on a local PC with a stand-alone setup or directly from the SharePoint Server using the document templates.
eDoc Excel Add-in	Adds the eDoc Toolbar Ribbon in Microsoft Excel. Like the Word Add-in, it can be installed on a local PC with stand-alone setup or directly from the SharePoint Server using the document templates.
eDoc PowerPoint Add-in (requires Word and/or Excel Add-in)	Adds the eDoc Toolbar Ribbon in Microsoft PowerPoint. The PowerPoint Add-in leverages the functionality of the eDoc MS Word and MS Excel Add-ins. Provides functionality to add MS Excel tables and Graphs and / or MS Word tables into PowerPoint presentations.
PowerPlay Web service for SharePoint External Lists with Parameters (Optional)	Provides support for external lists with retrieval arguments (Parameters)
PowerPlay Database Access Utility (Optional)	Allows you to retrieve data from most standard databases. There are two editions of this utility available (web service or local integrated in the Word and/or Excel Add-in).

General Features

- Integrates SharePoint list data dynamically
- Supports SharePoint External Content Type Lists with parameters¹
- Integrates data from Web Services (ASMX, SVC, REST)
- Integrates data from Relational databases²
- Can be used with or without SharePoint
- Dynamically updates documents' content
- Provides configurable update options for tabular data
- Creates tables with dynamic contents with custom filters and join conditions
- Query distinct records from data sets
- Supports table data sorting
- Generates nested tables with relational data from data lists
- Enables you to include images and other documents
- Contains 3 customizable buttons with pre-configured locations for inserting embedded documents and images
- Supports formatting of custom text content as well as field data
- Smart data caching ensures performance by allowing data to be loaded once and used several times

¹– Requires optional PowerPlay Web Service for SharePoint External Lists

²– Requires optional PowerPlay Database Access Utility

MS Word Add-in Features

- Enables the creation of reusable document templates
- Enables batch-creation of documents from a template
- Enables merging of custom text content with automated fields from data lists
- Generates nested tables with relational data from data lists
- Supports embedding documents which contain data list fields and tables into a master document and updates content dynamically
- Supports insertion of Excel eDoc Tables and Excel eDoc Graphs (requires eDoc Excel Add-in)
- Provides an option to automatically save PDF versions (location configurable) when saving the document

MS Excel Add-in Features

- Generates Tables
- Generates Graphs
- Supports Configurable heading and data row borders
- Supports formulae in table as columns
- Supports summary formulae at the bottom of the table

MS PowerPoint Add-in Features

The PowerPoint Add-in leverages the functionality of the eDoc Word and Excel Add-ins to help you create powerful presentations.

- Insert Excel Tables and Graphs in PowerPoint with all the functionality of the eDoc Suite & Excel Add-in

- Insert Word Tables in PowerPoint with all the functionality of the eDoc Suite & Word Add-in
- Automatically updates the data in the embedded tables and graphs

Editions: Standard & Enterprise

eDoc Toolbar is available in two different editions. For general purpose and standalone use the Toolbar is available in a Standard Edition, where a single user can install the add-in on his / her PC. Small workgroups can install the toolbar on several PCs and create and store data list connected documents in SharePoint or on a file server.

For larger user communities, we offer the Enterprise Edition of the eDoc Toolbar, where the solution is installed on a SharePoint server, integrated with a document template.

Features of the enterprise edition

- Installed on the SharePoint server and automatically deploys and installs on client PCs when a document is opened
- Automatically updates the add-in on all user PCs when a new version is deployed
- A master template (dotx) is provided for inclusion of other custom formatting & styles
- Server based configuration for managing **data lists** for end-users

Hierarchical Configuration Management

To facilitate use of a large number of data lists, whether the lists are created from SharePoint data, database data or web service data, eDoc provides a multi-level hierarchical configuration, simplifying and providing configuration flexibility.

- Global Settings
- SharePoint Site Specific Settings
- SharePoint Library Specific Settings
- Local Location Settings (for non-SharePoint documents)

PowerPlay Web service for SharePoint External Lists with Parameters (Optional)

Using external content types in SharePoint to obtain data from database and/or web services often requires parameters to be defined for these external content types. Obtaining and using data from these external content types (or associated External Lists) requires that the parameters are provided at runtime for data retrieval.

The eDoc system provides a web service that can be installed on IIS (with your SharePoint installation). This web service allows you to use these External Lists in your Word documents, providing the parameters automatically from the document server properties or custom properties (configurable in the add-in).

PowerPlay Database Access Utility (Optional)

Database connectivity is available via a web service (PowerPlay DB Connect Web Service) or directly from the client PC (PowerPlay Direct DB Connector). Most major databases are supported¹.

The PowerPlay DB Connect Web Service is a flexible tool that can be used to obtain

database data in XML & JSON formats for use in the eDoc Add-in or in any web application. This simple, yet powerful tool is installed as a web service on IIS and provides XML and/or JSON data from SQL Select statements from virtually all SQL databases¹.

Compare DB Connectivity Options:

	PowerPlay DB Connect Web Service	PowerPlay Direct DB Connector
Supports Most Major Databases¹	✓	✓
Database driver location	Server Only	Each PC
DB Connection Configuration	<ul style="list-style-type: none"> - Centralized on server - Web User Interface 	<ul style="list-style-type: none"> - On each PC - Integrated in the eDoc toolbar
Usability	Can be used to provide schema and data feeds to any application. Supported output format XML (data), XMLSCHEMAONLY, XMLWITHSCHEMA (xsd), JSON	<ul style="list-style-type: none"> - Limited to the eDoc Toolbar

¹ - Native database drivers (MS SQLServer, Oracle, Sybase Adaptive server) or via ODBC & JDBC (MySQL, Postgresql & others).

Database drivers for the required database need to be installed on the server for the web service or on the local PC if using the direct database connection.

System Requirements

Client	Microsoft Office 2007/2010/2013 (32bit & 64bit version supported)
Server	<ul style="list-style-type: none">• SharePoint 2010 & 2013 (Optional for Stand-alone edition. Not required when using Database & Web Service data sources only)• IIS 7 (Only for optional DB Connect Web service)• Database drivers (for the databases that you wish to use)

Additional Information

Please contact us at info@impulsebdltd.com if you are interested in a trial license of the eDoc Suite.

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