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# WHAT YOU SHOULD KNOW ABOUT
# PAPERLESS REPORT DISTRIBUTION

## IN THIS GUIDE YOU WILL FIND:

- ✓ What is Paperless Report Distribution?
- ✓ The Benefits of a Paperless Report Distribution
- ✓ Shopping and Configuration List for Paperless Report Distribution for the IBM i
- ✓ Some Myth Busting About Paperless Reporting Solutions

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# WHAT IS PAPERLESS REPORT DISTRIBUTION?

When does spooled file distribution become *Paperless Report Distribution*? When IBM i spooled files are converted to digital formats, which are then distributed automatically to internal / external recipients and archived to servers.

Paperless Reporting let you create a digital distribution and storage strategy for your IBM i reports, with little to no manual processing. It provides many significant benefits for any organization, including:

- Significantly reducing or eliminating report printing and distribution costs, through digital conversion of spooled file documents to popular formats such as PDF and Excel.
- Efficient and secure delivery of digitized spooled files by email, IBM i Integrated File System (IFS) folders, and archiving copies to other file servers on the network.
- Document bursting to split or subset spooled files into separated digitized files, and to change report layouts for different audiences…***without any programming*** to parse big data into usable information in formats that can be easily analyzed.
- Archival and spooled file management functions including auto-deleting spooled files; storing digitized spooled files to media; searching, viewing, retrieving and re-issuing old reports, and auditing/reporting on report distribution.

# THE BENEFITS OF PAPERLESS REPORT DISTRIBUTION

Paperless Report Distribution provides eight critical benefits to organizations when using IBM i spooled file distribution software:




Here's how each benefit enhances customer service, satisfies auditors, and more efficiently manages the critical information needed to keep your organization ahead of the curve.

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Paperless Report Distribution replaces printing, manual bursting, and delivery (by hand, mail, or courier) with a faster, more efficient and less expensive automated process using IBM i software to convert reports to formats like PDF and Excel, with secure, instant delivery via email, while maintaining an archiving trail and more.

## Conversion

### Native conversion of IBM i spooled file documents to popular digital formats such as Microsoft Excel (XLS or XLSX), Microsoft Word, PDF, HTML, CSV, XML, and TXT

- Information delivered in universal digital formats that internal and external users can use to quickly locate relevant information.
- No operational or programming support needed to convert reports.
- All conversion work is done on your IBM i seamlessly and transparent to the users.
- No additional network or PC servers need to be purchased or maintained.
- No need to drag IT Staff away from core responsibilities.
- Greatly reduce the number of printers required for old manual distribution method.

## Delivery

### Immediate delivery of converted spooled file data to users via email or direct download to file servers

- Automatic digitizing and delivery of electronic files can be triggered whenever a critical report is created as a spooled file. No user interaction is required, although ad hoc processing should be an available option.
- Users and companion sites immediately receive critical information directly from the IBM i in real time, in formats they can use straight away.
- Eliminates printing and distribution delays for faster, more streamlined processing.
- Substantially reduces postage and delivery costs by delivering to customers and business partners via email instead of snail mail, courier, and overnight services.
- Automated processing frees up IT resources to focus on core duties and responsibilities.

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## Bursting

Extracting subsets of spooled file reports and converting to digital formats, so recipients receive only the information they need and are authorized to view.

- Organization-wide reports such as the General Ledger or Sales summary, can be split into sub-reports that can be delivered to individuals or specified departments, or external reports parsed and delivered to customers.
- Key report information can be extracted and delivered to managers and executives.
- Summary reports with key metrics can be mined for upper-level staff from existing detail reports
- Reduces demands on application staff to clone existing reports to extract information or subset data. Bursting and extraction processes are run without additional programming.

## Reformatting

Reformatting and changing the sort sequence of converted documents for better presentation and readability.

- Existing documents can be resorted by different key fields for delivery.
- Existing report layouts can be reformatted, including changing column headings, moving spooled file data to a different location in the report, and masking secure report information.
- Frees up programmer time previously used to duplicate existing reports with different sort sequences or omitted data.
- Changing the layout of a report to make it easier to read without having to engage a programmer.
- Masking restricted and secured data allows organizations to hide sensitive data on widely distributed documents.

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## Extending Capabilities

Execute IBM and third-party APIs before delivering converted files to users.

- Extending digital conversion and delivery processing via API, providing capabilities beyond what's included in your spooled file distribution package.
- Adds custom functionality to your Paperless Reporting solution without programming.

## Securing

Securing converted spooled files to insure sensitive information is available only to authorized users.

- Converted PDF spooled files can be encrypted and password protected before sending to recipients, with password based decryption.
- Menu and command line options can be locked down through product security.
- Sensitive information in converted reports can be suppressed. For example an Excel spreadsheet could exclude a column that contains employee number or social security number.

## Managing

Managing spooled files: Archiving or deleting old spooled files according to schedule.

- Frees up disk space by automatically removing old spooled files.
- Avoids system issues that occur when keeping too many spooled files on system, such as job table overflow.

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Auditing

## Auditing spooled file delivery: Searching and retrieving old spooled files for viewing or to resend; accessing report logs detailing spooled file delivery

- Users can search for and resend lost or deleted reports even if the spooled files no longer exist.
- Managers can provide documentation for auditors and in-house staff to determine who received which reports and when.



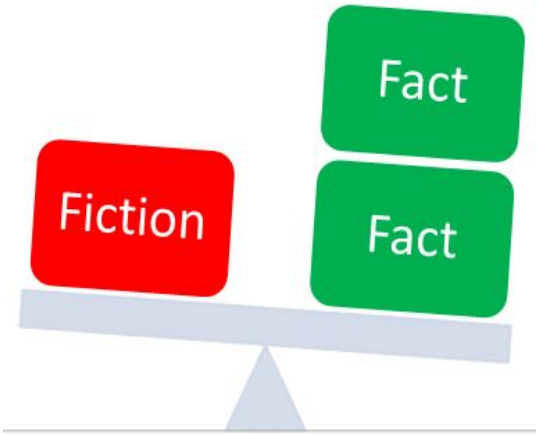
# SHOPPING AND CONFIGURATION LIST FOR PAPERLESS REPORTING SOLUTION FOR IBM i

Getting started with Paperless Reporting is easy on an IBM i and does not require any programming. Most shops can set up their paperless environments simply by installing or configuring the following packages, functions, and folders:

- Identify a “hit list” of reports that historically have been a pain to manage, or are critical to your operations and could be the first to set up with automated conversion, distribution and archiving for the fastest proof of concept, and faster ROI.
- Install an IBM i Spooled File Distribution package such as DRV Tech’s SpoolFlex that is easy to configure and performs the conversion, delivery, bursting, reformatting, extension, management, and auditing functions listed above.
- Set up output queue monitors and define the rules for automatically identifying spooled files to be converted and delivered, as the frequency needed for distribution.
- Create directories to store digitized report files on companion servers, such as a Web server or file server.
- Review Vendors: consider not only cost, but functionality and available support.

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# PAPERLESS REPORTING SOLUTION FOR IBM i:
# FACT VS FICTION

**Fiction:** **"You need a separate report server to implement an IBM i Paperless Reporting solution"**

**Fact:** *While there are some solutions that run on separate servers, they typically cost more and are not necessary. All the software needed for a Paperless Reporting solution can run natively on your IBM i system.*

**Fiction:** **"You can only download and store digitally converted files to the IFS"**

**Fact:** *Files can be saved from the IBM i to any file server on your network.*

**Fiction:** **"You have to create and maintain duplicate addresses books to store email addresses on the IBM system in order to send email to outside business partners, customers, and associates"**

**Fact:** *Many IBM i spooled file distribution packages can access from existing database files, customer master files, or and pull email addresses right from the spooled file page to direct the document to the desired recipient. Some solutions even provide built-in address books, if you don't already have email addresses on the IBM System.*

**Fiction:** **"You have to manually designate which spooled file pages to extract or create document subsets from"**

**Fact:** *Packages such as SpoolFlex can "read" a spooled file, searching through spooled files and extracting specific pages for digital conversion, based on variable information on the spooled page.*

**Fiction:** **"It's too hard to automate spooled file conversion and delivery. It's not worth my time."**

**Fact:** *It can be if you program an in-house solution that you have to maintain yourself, but many packages contain their own queue monitors and job schedulers to automate bursting, conversion, and report distribution. An efficient paperless report management system typically pays for itself in less than three months!*

**Fiction:** **"We have reports that contain sensitive information that we don't want floating around the company. There's no way to secure information keep track of which files are sent to which users"**

**Fact:** *Some Paperless Reporting packages offer encryption modules to secure and password protect converted PDFs. Alternatively, you can create Excel templates that exclude sensitive data. They also offer audit capabilities for tracking any file distribution see what was sent to whom, retrieving and even re-sending original files, as needed.*

**Fiction:** **"We don't print that much and I don't have enough in the budget for a paperless report package. I don't see that we would need all those advanced features"**

**Fact:** *Many Paperless Reporting packages are modular, each component providing added capabilities to the core package. Depending on your vendor, you can acquire only the capabilities you want to use, and you add different modules later for additional functionality. Most companies burn through a lot more paper than they realize. Ask your purchasing department how much paper your organization buys on an annual basis. Solutions like SpoolFlex typically pay for themselves in less than three months, and from that point on it's money in the bank! That's Budget that can be used for other modernization projects.*

**Fiction:** **"We can build our own report distribution solution using native IBM i utilities that will be free, and it will work just as well as a third party solution."**

**Fact:** *IBM i utilities can be used to create the spooled file management, conversion and delivery approaches discussed here. But a do-it-yourself (DIY) approach requires more time and money to design, implement, and (more importantly) maintain over time than a pre-configured third-party solution. DIY solutions are vulnerable to staff disruptions and shifting priorities. Third-party packages are supported by the vendor's entire programming and support staff, making them less vulnerable to in-house staff workload changes or personnel changes.*

## TO FIND OUT MORE

Since 2002, DRV Tech has been the go-to-expert for IBM i, iSeries, and AS/400 report automation and document management software, including IBM i Paperless Reporting solutions. If you want to find out more about creating your own Paperless Reporting environment, please contact us at our Atlanta headquarters at 678.417.1521, email us at support@drvtech.com, or visit our Web site at www.drvtech.com. We'll be glad to answer any questions you have and help you design your own report distribution strategy.