

EVERYTHING YOU NEED TO KNOW ABOUT PAPERLESS REPORTING SOLUTIONS AND IBM i SPOOLED FILE DISTRIBUTION SOFTWARE

IN THIS GUIDE YOU WILL FIND:

- What is IBM i Spooled File Distribution Software and a Paperless Reporting Solution?
- The Critical Benefits of a Paperless Reporting Solution
- Shopping and Configuration List for Paperless Reporting on an IBM i
- Common Falsehoods about Paperless Reporting Solutions





WHAT IS IBM i SPOOLED FILE DISTRIBUTION SOFTWARE AND A PAPERLESS REPORTING SOLUTION?

IBM i spooled file distribution programs are commercial paperless reporting solutions that convert IBM i spooled file documents to digital formats, which can be securely and easily distributed to internal and external recipients or servers.

A paperless reporting solution creates your digital distribution strategy for IBM i spooled file reports and other documents. It provides many significant benefits for any organization, including:

- Reducing or eliminating document printing and distribution costs through native conversion of spooled file documents to popular digital formats
- Efficient and secure information delivery of digitized spooled files using email, IBM i Integrated File System (IFS) folders, and posting to other file servers and websites
- Document modification to split or subset spooled files into separated digitized files, and to change document layouts for different audiences ... *without any reprogramming*
- Archival and spooled file management functions including auto-deleting spooled files; saving individual spooled files and output queues to media; restoring and re-issuing old reports; and auditing/reporting on report distribution

THE CRITICAL BENEFITS OF A PAPERLESS REPORTING SOLUTION

A paperless reporting solution provides these eight critical benefits to organizations using IBM i spooled file distribution software.



Here's how each benefit enhances your ability to service customers, satisfy auditors, and manage your system.



CONVERSION

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

- Information delivered in universal digital formats that any recipient can review on any device
- No operational or programming support needed to convert reports
- All conversion work is done on your IBM i. No additional network or PC servers need to be purchased or maintained

DELIVERY

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

- Automatic generation and delivery of digitized content is triggered whenever a critical document is created. No manual conversion is necessary.
- Users, companion sites, and customers immediately receive critical data directly from the IBM i in easy to read formats
- Eliminates printing and distribution delays when delivering critical documents
- Eliminates postage and delivery costs by delivering data to customers and business partners via email instead of snail mail, courier, and overnight services

BURSTING

Extracting and converting subsets of spooled file reports to digital formats (bursting), so that recipients only receive 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 generated for upper-level staff using existing detailed documents
- 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

- 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 cosmetic look of a report without having to create a programming task
- Masking restricted and secured data allows organizations to hide sensitive data on widely distributed documents

EXTENDING CAPABILITIES

Execute IBM and third-party APIs before delivering converted files to users (extending capabilities)

- 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

SECURING

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

- Converted PDF spooled files can be encrypted before sending to recipients
- Menu and command line options can be locked down through product security
- Sensitive information in converted reports can be masked



MANAGING

Managing spooled files through scheduled archiving or deleting old spooled files

- 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

AUDITING

Auditing spooled file delivery by searching and retrieving old spooled files for viewing or to resend. Access report logs detailing spooled file delivery

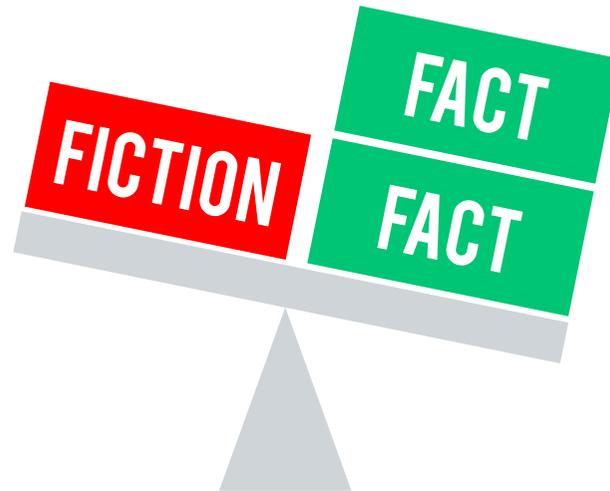
- Users can search for and resend lost or deleted reports
- Managers can provide documentation for auditors and in-house staff to determine who received which reports and when



SHOPPING AND CONFIGURATION LIST FOR PAPERLESS REPORTING ON AN IBM i

Getting started with paperless reporting is easy on an IBM i. Most shops can set up their paperless environments simply by installing or configuring the following packages, functions, and folders:

- Installing and configuring an IBM i spooled file distribution package such as DRV Tech's SpoolFlex, that performs the conversion, delivery, bursting, reformatting, extension, management, and auditing functions listed above
- Creating output queue monitors and rules for automated spooled file conversion and delivery, as needed for your spooled file distribution software
- Creating directories to store digitized report files on companion servers, such as a web server or file server



PAPERLESS REPORTING SOLUTIONS FOR THE IBM i: FACT VS. FICTION

Fiction: “You need to stage a Windows or Linux report server to implement an IBM i paperless reporting solution.”

Fact: *All the servers and configurations needed for a paperless reporting solution are contained on your IBM i partition.*

Fiction: “You can’t download converted documents to another file server or a website.”

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

Fiction: “You’ll have to maintain duplicate email addresses on an IBM i partition in order to send email to outside business partners, customers, and associates.”

Fact: *Many IBM i spooled file distribution packages can pull addresses from other address books, customer database files, or right from data on the spooled file page to be converted. Some solutions allow you to use built-in address books, if needed.*

Fiction: “You have to manually designate which spooled file pages to extract or create document subsets from.”

Fact: *Packages, such as SpoolFlex, can search through spooled files and extract pages for digital conversion, based on information on the spooled page.*



Fiction: “It’s too hard to automate spooled file conversion and delivery.”

Fact: *Many packages contain their own queue monitors and job schedulers to automate bursting, conversion, and report distribution. Packages also contain rules for automatically creating report distributions without manual input.*

Fiction: “There’s no way to secure sensitive information or to audit which files are sent to which users.”

Fact: *Paperless reporting packages provide encryption modules to secure converted spooled file PDFs. They also offer audit capabilities for tracking file distribution and reprinting converted files, as requested. Data can also be masked in converted files to hide sensitive information from file recipients.*

Fiction: “I don’t have the budget for a paperless report package, and I don’t need all the advanced features.”

Fact: *Many packages are written in modules, each of which provides added capabilities to the core package. Depending on your vendor, you only have to pay for the capabilities you want to use, and you can add on different module functionality later. Solutions like SpoolFlex typically pay for themselves in less than three months.*

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 paperless reporting solutions using IBM i spooled file distribution software. 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 website at www.drvtech.com. We’ll be glad to answer any questions you have and help you design your own report distribution strategy.



www.drvtech.com

GET IN TOUCH