



S4i Express- Electronic Document Management

Will S4i Express output reports in PDF format?

Yes, including documents like your invoices and statements, so you can eliminate preprinted forms, reducing operations overhead and eliminating expensive forms cost.

Will it e-mail and fax reports? How does that work?

Email: *S4i Express* e-mails using the OS/400 SMTP capabilities to send directly from the i5-iSeries and which can be received by any e-mail system including LOTUS Notes. You could also send the e-mail via a network server, though most people prefer to send directly from the iSeries. Many companies are e-mailing or FTPing sales, inventory and other reports to their field sales staff on a nightly basis. That reduces sales calls to the office faxes, etc. and speeds up the sales process.

Fax: *S4i Express* passes the formatted report, report segment, or bundle to the fax server you have installed on your iSeries. If you do not currently have a fax server, ask us about ours.

Can we e-mail invoices and statements? Can we eliminate our preprinted forms?

Yes. Many companies are e-mailing not only invoices and statements, but bills of lading, picking tickets, insurance declaration forms, etc. Revlon, for example, is e-mailing both their statements and invoices. The paper savings, and savings from eliminating preprinted forms are substantial. And the wear-and-tear factor on your staff will be reduced at the same time. We can help you pull all of this information together for your cost/benefit analysis, then put the plan into action. If your existing forms and/or logo are not presently available in digitized form, find out more information about our forms design package so you can design your own forms or find out how we can help!

Does S4i Express create (draw) original forms for overlays?

S4i Express outputs, but does not draw, electronic forms, however, our forms design package does! During creation of the PDF output, *S4i Express* overlays the page with one or more images/electronic forms in any of the following formats: GIF, PNG, PDF, JPG, or TIF. If you have a current preprinted form, it can be scanned in and redrawn to save you time. Data mapping can also change the entire look of your file or bring multiple files together to create a new layout.

Can we send (FTP) reports to our web/e-commerce server?

Yes, that is a built-in capability of *S4i Express*. It can help you speed information flow to not only your own people, but to your clients and vendors as well. You can FTP client account information - orders, invoices, credits, etc. - directly and automatically to your e-commerce server using *S4i Express*. Using *S4i WebView* allows internal and external customers access to their documents via a browser. Permissions can be established for iSeries/i5 users or network users. Client inquiries on account status are secure and phone calls to your company are minimized. That saves time, speeds cash flow, and lifts some load from your staff. Everyone will like that!

What file formats does *S4i Express* process?

S4i Express accepts and processes standard OS/400 SCS or mainframe "line-type" spool files, AFPDS, PDF and Tiff images.

We're a PeopleSoft/JDE OneWorld® shop. What can *S4i Express* do for us? What about the PDFs?

That's a timely question being asked by the entire OneWorld community, "What can you do to help us with our OneWorld reports that are output as PeopleSoft/JDE-flavored PDFs? The answer is simple, "Plenty." First of all, PeopleSoft/JDE's largest client has been running *S4i Express* for several years and is presently running *S4i Express for OneWorld*. Enjoy all the functionality of this solution with your PDF files.

Coupled with this implementation is *S4i Express WebView*, which adds browser-based access and ad-hoc distribution to your reports by authorized users, either internally, or externally to your organization. This would allow, for example, your vendors to look up Purchase Orders, or your clients to look up Invoices, etc. And it is a very fast, inexpensive and versatile way to get your info to the web without huge application programming initiatives (and cost). *S4i Express WebView* requires an application server such as IBM WebSphere or Apache Tomcat.

What formats can *S4i Express* output?

PDF, RTF, HTML, Generic WP (Word), ASCII, EBCDIC, TXT, PS, CSV (Excel)

Will *S4i Express* output reports so we can import them to a spreadsheet?

Yes. Many companies use output from *S4i Express* to perform spreadsheet analysis. *S4i Express* provides the report in CSV (Excel), RTF or TXT format and delivers it by the method best-suited to their need.

What delivery means does *S4i Express* employ?

Email, Fax, Print, FTP, Online Viewing, Client, IFS, NT, Other iSeries/i5, Novell, UNIX, LINUX, Mainframe.

How does *S4i Express* know who gets what report, in which formats, and the delivery method?

S4i Express employs a centralized address book, which we call "destinations", with an entry for each user. The destination determines who and where they are, including e-mail address, ftp address, etc. Destinations may also be groups where multiple people receive the same information (greatly simplifying maintenance when personnel changes occur).

Reports and report segments are defined independently of destinations, but can point to multiple groups or destinations. Once the report or segment is defined and there is a valid destination for the report, it may be distributed in the wide variety of formats and methods mentioned above.

S4i Express can also interface with your DB files, OS/400 directory user profiles and group profiles. Big benefit!

Can it split (burst/segment) reports? Can it bundle reports or segments and send them together?

Yes, using its Report Definitions as a guide, *S4i Express* can burst individual reports into segments, and then combine segments and/or full reports into a bundle with a header page (table of contents) and separator pages. In some cases users do not want their bundle until all the pieces are included. *S4i Express* can hold distribution pending arrival of all components of the bundle, with a threshold time at which it releases the bundle "as-is" to the end-user.

How would I send a report or bundle to multiple destinations simultaneously? What about sending a report to multiple printers?

This is accomplished by adding additional destinations to the report definition. *S4i Express* looks at the destinations to which the report is to be directed, then looks in the destination definition to learn how that particular end-user gets reports, then away it goes. The same holds true for network printers, which are set up as destinations. It's an elegant, but very straightforward, methodology.

What about V5R1 and its "InfoPrint" Server (5722-IP1)? Our IBM rep says it's the "be-all, end-all, do-all of report mgt." Magic or myth?

The latter. It's good sales talk, but InfoPrint Server doesn't stand tall when tested. *S4i Express* is a fully functional, flexible i5- iSeries document management system that will handle your document requirements easily, automatically, and continually, without necessitating changes to your applications. InfoPrint, on the other hand is singular and extremely limited in capability.

Are we going to have to modify all our reports to work with *S4i Express*?

NO. *S4i Express* is specifically designed to grab files from your existing output queues, then archive, burst and bundle where required, and distribute only the report information your end-user needs... and in the format that makes most sense to their particular task.

Can we view reports online? On the web? Will *S4i Express* download to a PC?

The answer to all three questions is "Yes". Reports can be viewed from an iSeries green screen, or they may be distributed to a client server, in a format suitable for viewing by either iSeries emulation on the PC, or from a browser, in .PDF or HTML format.

The *S4i Express WebView* option brings your application to the web. It adds a browser-based front-end to retrieving documents from *S4i Express*, further simplifying the accessibility of reports on your system (requires an application server like WebSphere, Tomcat, Web Logic, Macromedia JRun Server, iPlanet, Oracle, Sybase, etc. - note: we can run on the free versions of Apache Tomcat). This will allow you to rapidly and securely publish reports, invoices, statements or POs, to the web or an intranet without changing your existing applications. The user can access a menu of reports that are available to them according to their security access.

Want to "Webize" your application output? *S4i Express WebView* is priced thousands and often tens of thousands below other solutions. Give us a call to learn more and arrange an online demonstration of the *WebView* option.

Can we incrementally implement the features of *S4i Express*?

Yes. That is the suggested approach. You begin by creating report definitions and your distribution address book, and move forward from there.

Can we specify and search on specific indexes?

Yes. *S4i Express HostView* provides the ability to define specific indexes that may be used for searching as well as segmenting at the page level, as required for creating PDF invoices, statements, etc. with background images. Multiple documents can be linked together by defining "global" indexes.

For online viewing, *S4i Express* enables up to five related (indexed) reports to be open simultaneously, with a hot-key toggle between them. This feature is especially useful in A/R collections, for example. You might have a client on the phone who indicates they don't have a particular invoice. The reply? "No problem. I can provide that to you immediately. Would you like it by e-mail or fax?" Sure, you could print and mail it to them, but why not speed-up your receivables collection with instant distribution? *S4i Express HostView* option adds these ad-hoc re-distribution capabilities.

How does *S4i Express* store reports? Does it require an optical disk (COLD) subsystem?

That's a multi-part question. First of all, *S4i Express* does *not* require an optical storage subsystem, though optical is in wide and growing use by our clients. *S4i Express* is used as the "COLD" software component by many of our clients.

For storing reports, *S4i Express* uses your rules to recognize a file it is supposed to process. Then, it "captures" and places the file in its own repository. At that point, we don't need the spool file any more and use your rules to determine its disposition.

S4i Express includes a powerful archiver feature that uses "archive plans" to manage your data. A file is associated with a plan name. For example, you might have a plan you called 30-60-7, where the file would be retained on the iSeries disk for 30 days, then automatically moved to optical until 60 days after it was last accessed, then moved to tape archive to be expired in 7 years. Or, you could move it directly from disk to tape. Either way, *S4i Express* knows where your data is located and how to retrieve it rapidly. You could even elect to keep a backup copy "under a mountain in Montana". The archiver always knows the fastest route to the most current copy. If you set it up to have a backup copy somewhere and it finds the primary copy to be damaged, it will retrieve the backup, then go back and replace the damaged object with the back-up copy. That should help senior management to sleep better at night.

What happens when we need to reprint something?

That's the beauty of *S4i Express*. If you are archiving, the file may be viewed online and sent to a printing queue. Or, if you are using the *S4i Express HostView* feature, which supports indexing, you can also do ad-hoc "re-distribution" from any authorized workstation, sending the report, or segment of a report, by e-mail, fax, to print, etc. All of this is, of course, controlled by the security permissions granted to the particular end-user. The same holds true if you are using the *S4i Express WebView* (browser) option.

Can we control report viewing - who can see what? Can we suppress data in some reports?

Yes, *S4i Express* utilizes OS/400 security and also has its own powerful security capabilities built in. The end-user is a destination or group. Destinations and groups are controlled by the system administrator who has authority to manage and extend access rights to end-users.

In addition, *S4i Express* keeps historical record not only of who received and viewed reports, but also who *attempted* to view a report. Secondly, whether online or in print, columns may be suppressed so that data is only accessible by authorized personnel.

What about scanning and workflow?

We have repository exits that provide straightforward access via API to the spectrum of iSeries scanning and workflow systems in the marketplace. Ask about S4i Image Express for your complete document imaging solution.

A client question, verbatim:

"We've looked at several products only to discover they were comprised of multiple pieces "glued" together. Some ran components on the iSeries and the rest on NT. We had to redefine and set up the same information several times. The ongoing maintenance of those products would require multiple repetitive tasks for every change.

How much of *S4i Express* runs on the iSeries and how much runs on NT? How many places will we have to set up the same information in *S4i Express*?"

When we designed *S4i Express*, we had the advantage of studying other products and software architecture in the marketplace. We made the same "spit-and-glued-together" observation as you. An iSeries-centric architecture with a centralized definition for destinations and another for reports became the primary design criteria around which *S4i Express* was built, and an architecture concept we continue as the product evolves.

So, the first answer to your specific question is that *S4i Express* runs 100 percent on the iSeries. That includes document capture, archiving, indexing, segmenting, bundling and distribution. The whole enchilada-- all on the iSeries. (The optional *WebView* facility runs on your application server, which could be on the iSeries or any other platform.)

Secondly, *S4i Express* utilizes two basic, centralized definitions: report definitions and "destinations" (address book). This approach makes ongoing maintenance of *S4i Express* a very straightforward procedure without necessitating changes to the same data in multiple subsystems, or across multiple platforms.

In addition, if your e-mail addresses, for example, reside in a separate database, like Domino, there is no need to replicate them in *S4i Express*. We've provided exit points throughout *S4i Express* that allow the external database to be accessed. You can write the code to access your database or we can do it for you.

How difficult is *S4i Express* to set up initially? Will it take a guru? How long will that take?

No gurus required; we employ them so yours can be free for other tasks! *S4i Express* is an administrative rather than a programming task.

Setting up *S4i Express* is very straightforward, far simpler than most comprehensive document management products in the marketplace, which require not only significant technical expertise to set up, but also to administer and maintain on a ongoing basis.

S4i Express employs a centralized address book, which we call "destinations", with an entry for each user that determines who and where they are, including email address, ftp address, etc. Destinations may also be groups where multiple people receive the same information.

Reports and report segments are defined independently of destinations, but can point to multiple groups or destinations. Once the report or segment is defined and there is a valid destination for the report, it may be distributed in a wide variety of formats and by a variety of methods, including e-mail, FTP, fax, print, etc.

Initial setup time? That varies by the number of groups, destinations, and report segments. The most important answer here is that setting up *S4i Express* is very straightforward - report definitions and groups/destinations. Once a report definition is created, it may easily be duplicated and modified for use with other groups/ and destinations, or for security reasons, like suppressing a column from printing or viewing.

Can we interface to existing databases without replicating e-mail addresses, etc.?

Yes, we have clients who use corporate databases that are linked to *S4i Express* destinations. *S4i Express* has multiple exit points, including one that may be used to create an API to an external database. You can write the API or contract with us to do it for you; whichever works best for you. *S4i Express* also easily interfaces with your OS/400 directory user profiles and group profiles.

As we continue to grow, how scaleable is *S4i Express*? How can we know it will meet our transaction volume requirements in the future?

One of the best selling features of *S4i Express* is its highly scaleable architecture. And we have the "king-sized" clients to prove it!

S4i Express was designed with a unique architecture that makes it highly scalable. The same distribution disk that goes to our smallest client goes to the larger clients, like Shell Canada, and Perot Systems, who perhaps best stated the scalability and performance advantages of *S4i Express*:

"We evaluated the five major AS/400 report management products and found S4i Express far outclasses its competition, especially in speed, ease-of-use, and making ongoing maintenance changes. S4i Express was the only major product that would handle our 'stress test' without choking. It has more functionality, and fits all scenarios."

S4i Express "expands and contracts" within allocated iSeries-i5 resources, dependent on the transaction load. As the load increases, the "task" functions of *S4i Express*, such as Monitor, Recognize, Capture, Segment, etc. initiate additional (duplicate) tasks that process other transactions. As transaction load decreases, the tasks automatically shut down, releasing system resources.

Designed and written using the latest ILE programming techniques, *S4i Express* is extremely modular, yet integrated, in its structure. The system is completely Common User Access (CUA) compliant with a consistent use of screen panel design and program function (PF) keys

throughout. Where possible, common IBM programs (SEU, etc.) are used to select PF key assignments for non-CUA assigned keys.

S4i Express is extremely disk-friendly as compared to other document management products. All captured reports are kept in an online repository in a highly compressed state and generally require less space than they took in the spool queue. You can spread repositories across an unlimited number of libraries and ASPs. You can also specify how many reports are placed in each repository file. The low-level repository and archive file management routines (engines) are written using ILE C, and low-level APIs to provide the fastest possible file access, while maintaining compatibility with the OS/400 operating system.

How difficult is *S4i Express* to maintain as our business evolves? What happens when an end-user leaves?

Another best selling feature of *S4i Express* is its ease-of-use, by both the administrator and end-users.

The straightforward report definitions may be easily changed, or new ones created. There is no practical limit on the number of reports or segments you can define. Groups and destinations are nothing more than a centralized address book. If someone moves within the company, a destination is easily modified to send reports directly to them. The fastest way to block reports to a destination is for the administrator to change the destination status to "hold", so nothing will be distributed there. There is also a report that shows every report segment assigned to a destination. When someone leaves the company, the report segment definitions for reports they were authorized to view or receive may be easily modified, or they could be deleted from a group. You will quickly see how elegant this is when you install *S4i Express* for an evaluation in your environment. The WebView option that puts your reports securely online and pronto!

What's involved in implementing an automated document management system?

We have a Planning/Implementation Considerations document on our site that details the steps you will go through in a full implementation. Don't be intimidated by the amount of detail there. The major categories give you a quick overview, and the detail is found inside each of those categories. We've had some fairly sophisticated client implementations that have happened in a very short period of time due to the efficient design of *S4i Express*.

The basic steps in this process are as follows:

1. Analyze existing reports
2. Determine their destinations (address book)
3. Determine archive parameters
4. Determine indexing requirements
5. Define segmenting/bundling requirements
6. Create report definitions
7. Testing
8. Implementation

How does training work? Will we have to bring someone in-house to train us?

There are two basic approaches to training: Most *S4i Express* administrators are trained via web conferencing during their initial 30-day evaluation. Subsequently, they train the end-users. The administrator has the backup of our telephone technical support without the expense of bringing in a trainer. That's what most organizations do. Optionally, on a fee basis, we can provide onsite training for your administrators and end-users, tailored to fit your requirements.

In addition, we can put a person on site to manage implementation of S4i Express. Either way, we charge \$1,500/day plus travel/lodging actual expenses.

What kind of documentation will we have for S4i Express?

We ship extensive printed documentation with each of our products. We continually win rave reviews from our clients, who say our documentation is straightforward, complete, and written in a non-combative style that is conducive to quick learning and implementation! Our maintenance contract provides further 7x24 backup telephone support for our clients.

What about your support? How does that work?

S4i support is highly praised by our clients and revered in the industry.

Read what Revlon International wrote to us recently:

"Just a note of thanks for all of your help and support in setting up the S4i Express system. We can now e-mail statements, relief reports, status reports and our price books. All of this in a relatively short period of time due to the ease-of-use of your product and especially to your technical support staff, who have gone the extra mile to make this a successful installation. They have always responded to our problems quickly and efficiently and even modified the package to satisfy the special needs of our system. The documents that we are currently e-mailing have reduced the user workload and have also reduced courier and phone expenses, resulting in a bunch of happy users. Again, thank all of you for a job well done."

We provide *real* 7x24 support. No matter what time you have a problem, we have someone available to assist you. Not lip-service, not "We'll get back to you within 24 hours," or "You've used up your allotted support calls," but highly trained, professional support when you need it the most.

Our technicians are intimately familiar with our software and its application in busy environments like yours. In addition, our development team and software architects are available 7x24 to assist our technical support staff as and where needed.

During the first 90 days, when most support calls occur, support is free. Our license agreement prorates and bundles maintenance for the balance of the first year. This includes our 7x24 technical support and all PTFs. In the continental U.S., and in some parts of Canada, you may call us toll-free at **(800) 231-5280**. Our toll number is 760-631-5280. In subsequent years, support is billed at a percentage of the then-current price for the software.

Great software, great support, fairly priced.

How much does S4i Express cost?

S4i Express is competitively priced. We use the IBM "processor group" structure, so the price is based on the size of the i5- iSeries processor you are running. One of our account executives will be happy to discuss that with you in more detail. Give us a call at (800) 231-5280 or (760) 631-5280. We look forward to hearing from you!

Who else is using it?

The *S4i Express* client list reads like a "Who's Who" in the iSeries-i5 world, where it is in use in a wide spectrum of companies across a wide spectrum of industries.

We have very small clients, like a fish company in New England that processes only 8 reports per month; a small, 3-branch bank; a rural telephone company; and a small municipality in Alaska. And we have the giants of industry, like Shell Canada who has long used *S4i Express* to manage all of its reports; Perot Systems, who uses *S4i Express* to process all the reports for over 300

hospitals; and Revlon International, who keeps a great face -with their clients, using *S4i Express* to automatically distribute PDF-formatted invoices and statements by e-mail with background forms/images! The list goes on and on... companies like Harrah's Entertainment, Interstate Steel, and Eastern National Bank.

The bottom line is that *S4i Express* is a versatile, highly scaleable software product. It is widely installed, highly praised, under continual feature enhancement, and supported by professionals who understand how it works in your environment and who actually listen and do something about your problems and suggestions; what a concept!

Where is your development headed? Do you have new features coming?

S4i Express is continually under development. We have a "guru-level" architecture and development team whose mission is to meet the ongoing and perpetually expanding requirements of the document management marketplace. Input from our clients is critical to that process. You will find that we actually "listen" to what you have to say, comparing that feedback to the present product features. We have frequently added features to the software when doing so adds universally applicable functionality.

How can we get an evaluation copy of S4i Express? Who will help us set it up and learn how to use it?

We don't have a "demo" file for you to download, or a stripped-down test version. Instead, we ship our entire product to you for a support-assisted evaluation. We control its use via a product code that expires in 30 days, so we're protected and you get to see the real McCoy. You may download an evaluation form, complete, sign and fax it to us or complete it online. The evaluation agreement has two sections:

First is the basic non-disclosure agreement that says you won't stand on the corner and pass out copies of our product, that you may return it at any time during the evaluation without any obligation, and that, if you want to keep it, you understand you've got to enter into a license agreement.

Second, and perhaps most important, is the Evaluation Criteria section. We've "reverse-engineered" the features of *S4i Express* into a categorized checklist. That helps us understand what you expect our software to do for you. Our technical support staff uses that checklist as a guide as they help you get it set up and performing real work.

The evaluation agreement also has a place to schedule a "technical product overview" with a member of our support team. Using your evaluation criteria as a guide, we'll take you step-by-step through *S4i Express*. The initial call takes 2-3 hours, depending on the complexity of what you need to accomplish. Many companies have several staff members on a speakerphone to participant in this initial walkthrough. Then, we let you "play with it" for a while in your shop. Let your end-users see how it helps them get only the most relevant information; let your IT/IS Manager or CIO see how it cuts data processing overhead; let your CEO and CFO see how they can get the reports they need for strategic planning and financial analysis; send an invoice to a client or PO to a vendor, complete with background form, eliminating the expense and hassle of preprinted forms.

**Order a *FREE support-assisted evaluation of S4i Express.*
Call (800) 231-5280 or visit www.s4isystems.com.**