

Electronic Payments (ACH) | Store & Retrieve Documents | MICR Checks | Report Distribution



Leaders in Document Automation Solutions

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# Overview the total Document Automation World?

- eDocument Output processing and distribution of business documents on a daily basis
- eDocument Storage archive and retrieval of documents (file cabinet replacement)
- **e**Document Workflow involves routing and tracking eDocuments along pre-defined paths to appropriate persons with appropriate business rules applied. (Typically integrated with OCR/ICR technologies)





## inFORM Decisions Mission & Offerings?



#### inFORM's Mission Statement

To simply lead the pack in iSeries - IBM i Document & Banking Automation Solutions

#### **Document Automation Solutions**

Docs<sup>TM</sup> Suite of IBM i Native Document Automation Offerings

iForms - document design, management and output

iView – web based document archive and retrieval

iMail – email reports and documents with burst, sort and routing

*iFax* – *fax reports and documents with burst, sort and routing* 

*iPDF* – *converts forms and reports to PDF iSeries native* 

#### **Banking Automation Solutions**

iChecks – secure and compliant laser M.I.C.R. check printing

ACH – transmit funds securely and electronically from the iSeries

Positive Pay – automated electronic report for check security

Check-Secure – removable, programmable security key system for laser printers





# Benefits of Implementing Document Automation Technology



Reduce cost of paper (Blank or electronic forms cost less)

Immediate web portal access to stored documents with enhanced security

Eliminate Form Waste & Obsolescence (organization can respond quicker to internal/external changes)

Eliminate labor intensive processes:

loading, bursting, stuffing, mailing, stripping, copying, collating/decollating, storing, wasting, managing paper documents

Immediate remote distribution of reports and documents (payroll checks, purchasing, sales reports, etc. etc.)

Eliminate costly filing cabinet and storage space work processes Improve quality of forms (every form is an original)





### Sample Applications that can be automated with iDocs



Paperless Technologies to Save our Plane

Payroll and AP Checks

Sales Order Acknowledgements

**Purchase Order Forms** 

Material Certification forms

**Invoices** 

**Statements** 

**Quote Forms** 

Sales Order Forms

Purchasing Department request for Quotation form

Material Receiver Forms

**Debit Memos** 

**Delivery Receipts** 

**Bill of Lading Forms** 



Preprinted Forms









## iChecks – iSeries native laser, MICR check printing





Print negotiable checks to standard laser printers with MICR toner on blank security check stock

Print Logo, Signature, Print Data, Check Form and MICR line on a single pass from multiple accounts

Increase check printing security

Password Access to iSeries, Business Software and iChecks Positive Pay and Audit Reporting Features

Decreases Costs associated with pre-printed checks Check-Secure - removable signature "key" security



Check-Secure™





# iMail – iSeries native emailing



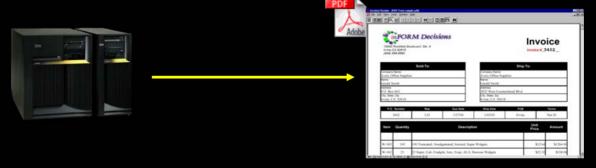
Native iSeries based document and report delivery module

Utilizes existing network SMTP configuration

Very simple single screen set-up

Email messages, and attached forms, reports and business documents in various

formats - namely Adobe PDF



Deliver email in real-time or place in QUE for scheduled delivery

Auto deliver *and* receive spool file reports, database files and/or merged electronic documents in DIF, RTF, EXCEL, HTML ...





# iFax - iSeries native faxing



Full function iSeries NATIVE, completely software based fax solution (No additional expensive hardware to maintain!)

"Snap on" module to iDocs eDocument Management software

Combines send and receive fax processing

Supports bursting and sorting of fax output

Optional web browser Viewer to edit, send, receive, display, and track faxes

Seamless interface to receive merged iDocs documents to fax out

iFax supports PC faxing for creating, viewing and sending faxes

Supports iDocs "Smart Routing" functionality











# iView - Web based document Archive & Retrieval



Secure access to any/all documents through web browser with security and flexibility

Manage Millions of records with Quick Retrieval

Virtual folders quick and immediate user control to folders and documents

Integration to inFORM's touted SmartRouting<sup>TM</sup> technology with iDocs

Link scanned documents, merged iDocs files, spooled files, windows based documents, PC graphics to iSeries applications – **no programming required** 

Easily Share documents

Full Text Search Capabilities

Secure & Confidential

Offsite Storage for Disaster Recovery

Recover Valuable Office Space

NO Programming Required







# A unique and powerful feature of **iDocs** allows users to utilize ANY Win Compliant Forms Designer to...



Design... Map... Integrate...

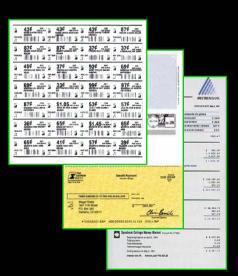
to any iSeries Business Software application









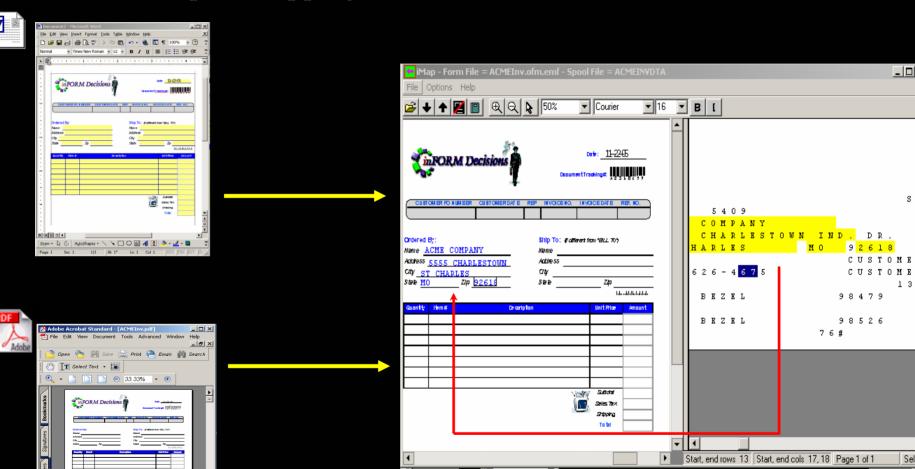






In the below graphic, a WORD and ADOBE form are being exported into inFORM's iMAP iSeries Graphical Spool Mapping environment

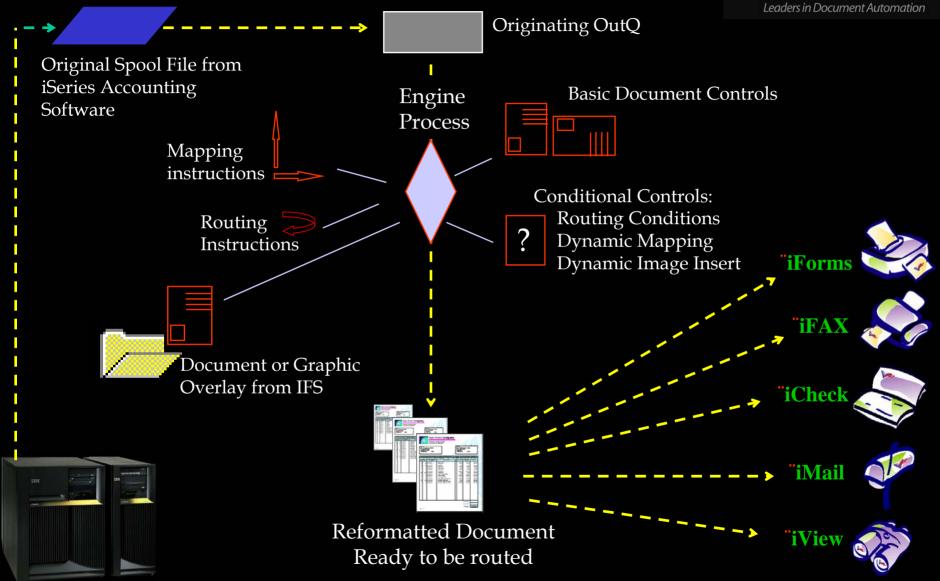




Once forms are mapped, they are simply uploaded and integrated to iDocs Native iSeries Document Management Software

### Overview iDocs<sup>TM</sup> Document Processing System

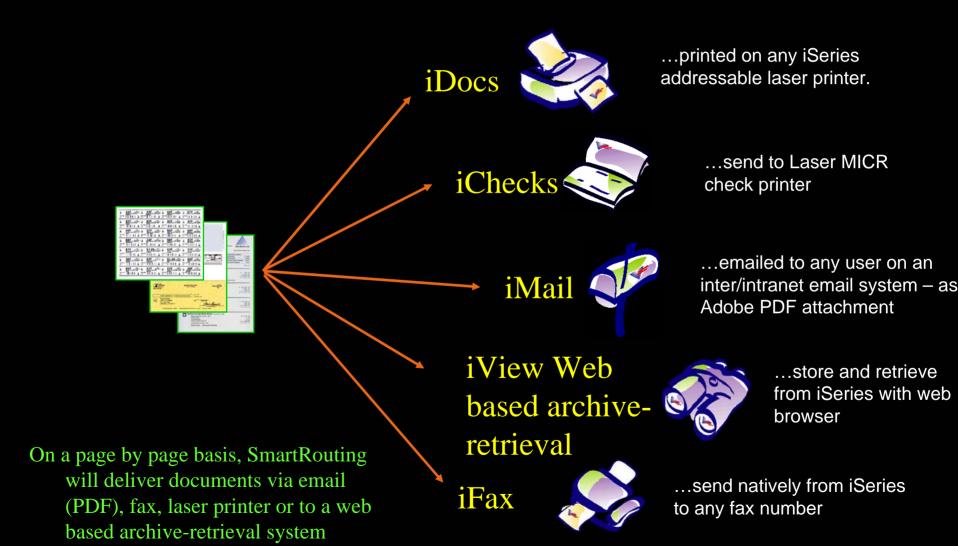




## inFORM SmartRouting<sup>TM</sup>

# Decisions Leaders in Document Automation

### Where the real return on investment begins!



### inFORM's "Smart Routing" Example



Define a key or 'look-up value' in a spool file ( or database file )

F18=Update F12=Previous



In this scenario, the customer number is being defined as the 'key'.

In the next slide, the customer number; CUSTNBR will be used to look at the database file, locate *and* determine the output or 'delivery' device ie; email, fax or laser printer.

```
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: 56
                      iMail Smart Routing
     Application: A BARCODE a Bar Code
File . . . . . . . . . . . . :
                               INVDATAL1
Library. . . . . . . . . . . :
                               DCYTRNLIB
Member . . . . . . . . . . : <u>*FIRST</u>
                      Mapped Field Used As
Primary Key. . . . . . . : CUSTNBR F4=List
Secondary Key. . . . . . . :
Trinary Key. . . . . . . :
                                          F4=List
Prefix to Primary Key. . . :
Retrieve email column from . : 7 to 70
Invalid email Out Queue. . . :
    F4=Prompt
                F6=Email Default Values
                       inFORM Decisions
                     iFAX Smart Routing
0:41
      Application: A BARCODE a Bar Code
 File . . . . . . . . . . . :
                              INVDATAL1
 Library. . . . . . . . . . . . . . . . . .
                              DCYTRNLIB
 Member . . . . . . . . . . . . :
                      Mapped Field Used As
 Primary Key. . . . . . . : CUSTNBR F4=List
```

Secondary Key. . . . . . . : \_\_\_\_\_\_

Trinary Key. . . . . . . :

Prefix to Primary Key. . . . :

Retrieve Company Column From :

Retrieve Contact Column From :

Retrieve FAX Column From . . :

Invalid FAX Out Queue. . . . :

F4=List

F4=List

268

278

269

In *Smart Routing* definition 1, the customer number locates the email address from the database file

In *Smart Routing* definition 2, the customer number locates the FAX number from the database file

## inFORM Decisions

Company Overview



- IBM Midrange Document Management solutions since 1994
- Mission and focus has been on AS/400, iSeries, IBM i Document and Banking Automation environment
- Our paperless (tree-saving) solutions led to our full commitment to a *Green* movement: www.informdecisions.com/trees
- Corporate office is in Southern California (Rancho Santa Margarita)

#### iDocs & iChecks

Powerful iSeries based
Form and Check
Generation software

#### iMail

iSeries Native Email selectively email forms, reports and checks in a PDF format automatically

#### Output Management

Create... Distribute... Archive... Retrieve

iSeries Native Online webbased document Imaging & retrieval

iSeries Native Online Faxing of forms, reports and checks Automatically.









### Brand Name clients... Award winning software



















July 1998







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