

Electronic Document Distribution:

BETTER DOCUMENTS. BETTER DELIVERY. BETTER TOGETHER.



Introduction

Today's economy presents numerous challenges to the modern business enterprise. You can go to the Internet or your local bookstore to find volumes of information detailing the burden of doing business in a less-than-stellar economy, but the demands boil down to this:

"Improve vendor/customer communications and cash flow, but spend less money doing it and don't complicate things."

It's a tall order and creates headaches for IT professionals, purchasing managers, and CEO's alike. Historically though, one of the most obvious strategies is the most often avoided: remove outdated, inefficient document management processes and replace them with new technologies that save time and money.

The fact is that while the market becomes more fast-paced and competitive, the methodology and technology governing business document distribution remains static and poorly suited to handle the demands placed on them.

Managers and IT professionals avoid making major changes to document distribution for two primary reasons:

- Cost and fear of change
- Integration and compatibility deficiencies in new document distribution technologies

These reasons have not been entirely unjustified. There are numerous horror stories about corporations installing major document management solutions that do everything from crashing immediately and/or failing to live up to expectations. Old document management technologies are widely regarded as the devil you know and much safer than the devil you don't.

Those times are now past. New developments in Electronic Document Distribution (EDD) mean that progressive corporations can eliminate pre-printed forms, fax machines, burdensome filing chores, and numerous other time and money wasting factors while efficiently creating, sending/receiving, and managing mission-critical documents from seamlessly integrated solutions. These new solutions are stable, easy to maintain, easier to use, and provide greater document security and tracking.

Put together, the individual benefits and features of EDD add up to the most compelling reason to make the switch: You're beating the competition. Remaining competitive in an adverse economic climate requires bold thinking, careful planning, and a willingness to take steps that your competitors can't or won't take.

This White Paper will provide a detailed explanation of a truly integrated Electronic Document Distribution (EDD) strategy along with long and short-term benefits. In addition, this White Paper will lay out the steps involved in implementing EDD in the most efficient and cost-effective manner.

Part 1 – The Cost of Doing Business the Old Way

Using old technologies to create and deliver mission-critical documents is expensive, and some of those costs are more tangible than others. Many companies continue using outdated machinery and practices because they have no idea how expensive they really are.

Overhead Costs

To truly appreciate how much overhead costs are wrapped up in old document distribution methods, consider how much you spend on the following:

- Pre-printed forms - include reorders due to mistakes, changed area codes, new logos, changed address, etc., as well as blank MICR checks.
- Paper costs – you'll also want to think about how much paper gets used productively versus wasted due to errors or mechanical failure
- Toner – this entails fax machines, copiers, and printers.
- Postage – include domestic, international, and rush mailings
- Manual fax machines – make sure you include the cost and maintenance of the machines in addition to the expense of running and maintaining fax lines dedicated to your manual fax machine system

Processing Efficiency & Accuracy

These factors are harder to track but make no less of an impact on your company's profitability. The average business professional never realizes how much money is being thrown away because many of these processes are seen as fixed and therefore unavoidable. Consider these questions:

- How much time do your employees spend standing at the fax machine rather than sitting at their desks working?
- How much time and space gets dedicated to filing hardcopies as well as retrieving them later?
- What kind of resources get used up when business documents need to be printed, bursted, packaged, addressed, and then mailed?
- When human error or mechanical failure occurs during manual faxing, filing, and mailing, how much time and effort gets put into identifying and correcting the problem? More important, what kind of impression did this mistake make on the vendor or customer at the other end?

Business Cycles

The amount of time it takes for you to turn an invoice into a payment and a purchase order into on-hand supplies depends on the accurate, reliable, and swift delivery of mission critical documents to vendors, customers, drop shippers, and financial institutions, among others. Shortening the cycle of creation, delivery, and response for all of your key business documents directly improves cash flow, customer loyalty, and vendor efficiency. Consider the following:

- What are your current business cycles and how do they measure up to the competition?
- How would it increase your profitability and customer/vendor satisfaction if you could shave several days, or even weeks, from your average cycles?
- How often are your business cycles affected by human or mechanical error? Lost faxes or mail deliveries, partial delivery of multi-page documents, someone punching in the wrong fax number. All of these factors needlessly expand numerous business cycles and result in decreased cash flow.

Part II – Defining Electronic Document Distribution (EDD)

EDD is not a complicated process. Using the right vendor, most companies that make the switch have discovered that implementing EDD is the easiest big change their company has ever made.

The Concept of EDD

The whole point of EDD is to take electronic output from any major business application and reformat it for delivery to multiple destinations including:

1. Print datastreams for delivery to printers
2. Fax format for delivery to fax machines
3. Email format for delivery to email inboxes.

In addition, EDD allows users to receive incoming documents as faxes, emails, or print based on their easily customized preferences and with flexible routing options.

What distinguishes true EDD solutions is that end users do not think about or participate in data formatting or conversion for any of the three delivery methods listed above. In fact, all back-end functions and technical idiosyncrasies are invisible to the end user. The result: users are insulated from the details of handling and reformatting documents while the overall distribution process becomes easier, faster, more efficient, and less prone to human error.

It All Works Together

While EDD operates like one truly integrated solution, there are actually several components working in tandem and often simultaneously.

Forms, Label, Check Design – Eliminating pre-printed forms requires the implementation of a document design solution with intuitive and user friendly graphic design, data mapping, and testing functionality. An EDD compatible document design solution also provides the ability to install commands and logic that automatically communicate customized rules and actions governing how a document is delivered, who gets it, security levels, error handling, and how to display specific kinds of data. The same forms solution should also handle the creation and delivery of barcode labels and MICR checks in addition to forms.

Fax, Email, Print Distribution – Solutions in an EDD environment can receive business application output, display and position it according to automatic commands and logic, and then deliver a clean, professional business document by print, fax, or email automatically in batch or interactively. EDD solutions should also receive incoming documents as faxes and emails and automatically route them to the intended recipient.

Business Application Integration – The entire EDD suite must integrate seamlessly with a company's business and email applications so that the end user has absolutely no involvement in back-end operations. The act of sending and receiving mission-critical documents should take place entirely within familiar application screens to maximize efficiency and minimize the learning curve.

It's Easy To Do

The purpose of EDD is to make life easier, not to add work for either system administrators or end users. The right EDD solution is easy to put in place, easy to maintain, easy to use, and easy to troubleshoot.

Putting EDD in place without a lot of headaches requires a vendor who can provide customized snap-in installations and integrations that remove guesswork and potential for human error. Look for a vendor who offers plug-and-play integration solutions specific to your application as well as powerful integration tools targeted at environments using homegrown applications. At the same time, not all

installations are created equal. Extensive or complex installations may require specialized assistance, so make sure that your vendor offers a full range of onsite and offsite training, professional services, and tech support.

As previously stated, EDD solutions should also be easy to maintain and troubleshoot. The cornerstone of true EDD is cross-platform support. Solutions utilizing central repositories for information including user profiles, address books, cover sheets and notes, can be updated from any platform and those updates are then automatically made available to every existing platform without creating redundant data storage. In addition to cross-platform support, an EDD solution should also contain automatic diagnostic, backup, and purging capabilities that catch and prevent problems before they occur. All together, this kind of functionality removes the system administrator from performing time consuming, repetitive, and tedious tasks.

While it's been mentioned a few times already, it bears repeating that the most important aspect of EDD is that it is easy for users at any technical skill level. This is where most companies see the most ROI when installing EDD.

It's Immediately Cost Effective

EDD costs less and not just in the long term. Drastic reductions to overhead, improved business cycles, and streamlined workflow will produce significant savings in months, not years.

The biggest mistake made by most companies seeking EDD solutions is that they make their decisions based on the short term expense of buying and installing EDD while ignoring the potential for time and money savings in the months following a successful installation.

Most companies see ROI within six months after going into production with a full EDD solution based on improved business cycles, increased user efficiency, and elimination/reduction of numerous overhead expenses. EDD continues to be cost-effective in the long term because it is much more scaleable compared to manual fax machines, mail rooms, and hardcopy filing and storage systems.

Part III – Quadrant Software EDD Components in Action

Formatter: Cut Document Page Counts by 75% & Increase Clarity

What if you could shrink your iSeries output from a 25-page purchase order to 10 pages? Then suppose you could digitally customize a 10-page invoice from landscape to portrait format, and then modify the header, body, and footer fields, turning that 10-page document into an easy-reading three-page document? What if you could do all of this automatically from the iSeries without any programming? It would save time, money, and postage, while cutting paper, envelopes, and toner usage.

Quadrant Software's Formatter, accomplishes all of these functions automatically in conjunction with Formtastic Fusion5. Used together, these products take large, difficult-to-read reports and business documents and easily reduce them to smaller, easily managed documents. Formatter creates fewer document pages with the following functionality:

- Eliminates redundant header and footer information on all but the first and/or last page to create more room for document detail items.
- Concatenates detail items to allow for more detail lines on each page.
- Recalculates page numbers
- Performs input data mapping to new positions on output definition
- Inputs directly into Formtastic Fusion5 for data processing on the electronic form.

For example, instead of printing the total, freight charges, and special instructions on every page of a 10-page invoice, those items can now be configured to appear on the last page only, creating more space for invoice detail data, which reduces the total number of printed pages. That detail data can also be customized to take up less space to reduce document page count even further.

Formatter uses a dual-screen PC GUI that lets administrators download, modify, and view original and reformatted spool data simultaneously, then output a shorter, intelligently reformatted spool file that is ready for data mapping and a professional design using Formtastic.

Once spool data is reformatted using Formatter, those modifications can be saved as a document template that resides on the iSeries and can be applied to spool data automatically in the future. Mission-critical documents become shorter without sacrificing readability or requiring complex customized programming.

Quadrant Software is the only company offering a product like Formatter! You don't have to have Formatter to use Formtastic, but it's highly recommended if you want to maximize your EDD investment.

Formtastic Fusion5: Forms, MICR Checks (w/printers), Bar Code Labels

The first step in EDD is implementing a forms design solution that is easy to use and customizable. The right forms solution eliminates pre-printed forms, pre-printed checks, and streamlines labeling processes.

Formtastic Fusion5

This solution makes document design and production easy for novices while giving experienced users expanded design and delivery functionality. Utilizing a split-screen design interface, users can simultaneously view and make modification in either a raw data or WYSIWYG mode.

Formtastic Fusion5 incorporates numerous tools for version management, synchronization, data and graphic positioning, layer management, as well as installing custom commands and logic. Many of these tools operate in the background allowing the designer to take advantage of their functionality without adding steps to the design process.

In addition to the rapid creation of new document designs, Formtastic Fusion5 handles major and minor document revisions with equal ease. Changes to graphics, data mapping, stored signatures, and other elements can be quickly tested and then put into production. The finished product is immediately available to all authorized users and automatically updated on all platforms.

Formtastic Fusion5 easily delivers any document type ranging from standards like invoices and purchase orders to industry or application-specific documents like bills of lading, insurance quotes, and medical reports.

Formtastic Checks

Formtastic Checks centrally manages all MICR check design, creation, and printing with complete security. The solution converts business application output to accounts payable checks, payroll checks, and direct deposit receipts automatically while eliminating the costs and risks of using pre-printed checks. Instead, Formtastic Checks merges spooled data with electronic check overlays and signatures to create checks on blank check stock for secure batch or interactive check printing.

FormsPacks

Application-Specific Forms At Your Fingertips

FormsPacks are pre-designed, pre-mapped forms templates that include everything from invoices to order acknowledgements in clean, crisp portrait and landscape orientations. Quadrant Software offers application-specific **FormsPacks** for PeopleSoft, MAPICS, SSA Global (BPCS & PRMS), daly.commerce, CommercialWare, as well as an all-inclusive **FormsPack** for eBusiness including a broad range of pre-designed mission-critical forms.

FormsPacks drastically reduce production time by eliminating data mapping and design.

Additional security features include the ability to generate Positive Pay reports, built-in audit logs to track all check activity, and restricted access to the MICR font, among many others.

Formtastic Labels

Formtastic Labels automatically generates labels by integrating the labeling process with any application program and existing database files. This solution turns supplier, customer, and prospect maintenance files into address labels for mailings and produces custom as well as industry-standard bar code labels to fulfill distribution and inventory requirements using laser and thermal transfer printers. Formtastic Labels translates variable data to over 25 different bar code types and turns database label output into UCC/EAN-128, UPC, AIAG, 3 of 9, extended 3 of 9 and PostNet bar codes and WalMart, UPS, and FEDEX (etc.) compliant labels using blank label stock.

Formtastic's No Programming Architecture

Formtastic works with your business applications with no programming or source code changes by extracting and remapping data already available in spooled files. Formtastic contains an automated forms generation feature that monitors the forms output queue. When it finds spooled data it will merge the data with the specified forms and print/distribute automatically.

FastFax/Enterprise: Email, Fax, & Print with Seamless Application Integrations

A flexible and reliable faxing solution streamlines workflow and should integrate seamlessly with any business application. It should also allow users to send/receive, track, and manage their faxes without time and space consuming filing procedures. To accomplish these goals, FastFax/Enterprise fully integrates LAN and iSeries 400 document distribution by fax, print, or email according to easily defined preferences.

FastFax/Enterprise handles fax traffic from one central location and eliminates the dependency on stand-alone fax machines, client-based fax solutions, or the need to have separate fax solutions for different computing platforms. FastFax/Enterprise also utilizes Central Repositories consisting of PhoneBooks for contact data; AttachmentBooks for attachable static documents; and NoteBooks for cover sheet notes. FastFax manages these repositories without duplication of data across the enterprise. Instead, FastFax/Enterprise maintains a virtual link to the physical data, providing access to only authorized users and reducing traffic by processing multiple physical updates.

E-Mail Gateways

Email continues to grow as a means of distributing incoming and outgoing documents and plays a key role in shortening business cycles. Using E-Mail Gateways, FastFax/Enterprise utilizes the email client to deliver mission-critical documents to remote or local printers, fax machines, or email recipients with little or no user intervention. Users receive documents as easily as they can send them, and delivery can occur in batch or interactively. This can all be accomplished from any platform and these tools feature transparent integrations with Microsoft Exchange, Lotus Domino, Novell GroupWise, or any SMTP server.

True EDD = True Integration

The backbone of EDD is across-the-board integrations between EDD components, business applications, and PC applications. This reduces training, troubleshooting, human error, and the creation of complex processes that mitigate the benefits of EDD. Quadrant Software provides this kind of functionality using snap-in integration modules for PeopleSoft (formerly J.D. Edwards), SSA Global (BPCS & PRMS), CommercialWare, MAPICS, daly.commerce, Friedman, Vormitagg, Mincron and others. Integration modules also exist for image archiving solutions provided by Gauss Interprise, Real Vision Imaging (RVI), Vanguard, and more. These integration modules provide a seamless integration with easy plug-and-play installation. Using FastFax Extractor and other robust programming tools, Quadrant Software's EDD solutions also integrate invisibly into any other vendor application or proprietary solution.

Advantages of EDD

Reduce Expenses

That EDD saves money is a proven fact. The results can be seen in companies in every vertical industry and with IT environments ranging from the very straightforward to incredibly complex. More important in today's challenging economy, the results are immediate. Most companies implementing a full EDD strategy see a return on investment within months.

"Formtastic was implemented on August 27 and easily paid for itself by the end of the year."

- Cindy Mathes, VP of Information Services – Founders Insurance

"The savings in one year more than paid for the investment."

- Tina Colon, Manager of Systems and Programming – Bagcraft Packaging

"I would say our ROI on FastFax was about six months. On top of the savings, there's no more standing around the machine to see if something was sent successfully, and there's no more manual routing of paper."

- Alan Schuetze, Gauss Interprise - Product Manager

Streamline Workflow

The key here is seamless integrations. EDD solutions should be practically invisible to the user and allows them to take advantage of their time saving features with minimal training. As a result, productivity increases dramatically and valuable work hours can be allocated to other important projects.

"All of the user level intervention is taken away. So they do not have to print purchase orders and then fax them manually through a fax machine everyday."

- Ken Oyler, MIS Manager – Jackson Products

"The way our previous system of fax machines worked (the lost faxes, getting paper and toner cartridges, people having to get up to go stand and wait at those machines), I know that FastFax saves us time and money because the user can now interact with everything from their desk."

- Randy Rhines, VP of Information Services - Melton Trucking

Improve Accuracy

Saving money and time means nothing if the documents don't reach their intended destination securely and reliably. Using EDD, you can send and receive mission-critical documents according to the recipient's preferences and update internal and external contact information across the enterprise from one central location.

"Using EDD, purchase orders are automatically faxed to suppliers and sales order acknowledgements are automatically faxed to customers with no chance of error."

- Richard Welling, Project Manager – Dean Foods

Improved Business Cycles

Cash flow is vital in any economy, and the ability to rapidly deliver mission-critical documents, easily check on their status, and quickly resend documents in batch or interactively means that invoices, purchase orders, order acknowledgements, and all other major and minor communications get received and processed with maximum efficiency.

“Before FastFax, if someone didn’t get an invoice, the user had to get up, find the invoice in the filing cabinet, make a copy, and then fax it through a regular fax machine. It was time consuming. Now they ask the customer ‘What was the order number?’ Then they pull up the invoice and send it out again right from their screen. After they send it out they can make sure that it was sent. It’s very friendly and straightforward.”

- Tina Colon, Manager of Systems and Programming – Bagcraft Packaging

Conclusion

Switching from old document distribution technologies to EDD does not have to be difficult or costly, and you don’t have to wait for long-term ROI. The solutions exist where EDD can be implemented quickly and easily for dramatic savings in time and money.

The key buying factor is finding solutions from a single vendor that integrate across the enterprise as easily and seamlessly as they integrate with each other and your business application.

Quadrant Software can help you get started with a free, interactive EDD demo along with an ROI estimate specific to your industry and company. Quadrant Software is an IBM Business Partner and has provided EDD solutions to every vertical industry for over a decade.

Contact us at sales@quadrantsoftware.com or visit us online at www.quadrantsoftware.com. You can also reach us at 800-258-3399 or 508-828-6242.