



# FOUR HUNDRED *Stuff*

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## Document Capture, GUI Admin Tool Added to S4i Doc Management System

—Dan Burger

One of the great benefits of an electronic document management system is having a system that captures, indexes, and delivers or archives documents and reports in a single repository allowing greater organizational workflow and retrieval. Much of this work can be automated using standardized forms with numbers or bar codes that assist in indexing and filing. However, there are documents that are non-standard and require individual handling to place them in the correct files. That's where Desktop Capture, a new product from S4i comes into play.

Let's take an accounts payable process as an example. The typical documents that relate to paying an invoice are items such as the purchase order, the accounts payable invoice, and packing slips or bills of lading. A company with a document management system will store these electronically and those documents will be indexed using identifiers such as vendor numbers and purchase order numbers. All these standard documents will be kept in files sorted by vendor names. An important part of these standard documents is the location on the form of indexing numbers, which assist the automated scanning and filing process.

Desktop Capture was designed to organize all the non-standard document layouts where crucial index data may fall anywhere on the page of the miscellaneous and free-form documents that aren't identified with a numbering sequence or any type of indexing method, for instance. These are important related documents such as digital or hard copy correspondence that could be an e-mail or a word processing document, a photo or other graphic, and other ancillary information that can and should be kept in a single repository and indexed for easy retrieval.

Rather than having random documents floating around in numerous, unaccounted files, this process leads to greater organization through indexing and easier retrieval of all documents relating to a single customer, a single vendor, or a single employee (the human resources advantage).

This process can be accomplished from a variety of locations branch offices using a network scanner and sending the electronic files to a network folder, for instance or from a scanner attached to a single user's PC. Understand that the speed of this process is directly affected by the speed of the scanner. A desktop scanner should be considered for relatively low volume, small business requirements.

The processing of scanned documents is simplified for those that have an ERP, CRM, SCM or other back office back end document management system with files indexed against a database. In those instances, a user can drag scanned documents to a window where a vendor number, for instance, can trigger the automatic completion of additional information relating to name, address, and other identifiers that can help during subsequent alternative retrieval methods.



The S4i document management system, called S4i Express, has a Web-based retrieval function to gather all documents relating to a specific individual (employee) or company (customer or supplier). It's an easy interface to get new documents into the back end content management system.

Desktop Capture has been deployed for four months in several beta sites. It is now generally available with pricing on a named-user scale that begins at \$1,295 per user with discounts based on an increasing number of users that brings the per-user price to \$495. It runs on Windows operating systems from XP to Windows 7.

One of the beta sites, Topicz, a food distribution company, has been using S4i Desktop Capture in its accounts payable group for several months. Bob Reckers, Topicz IT manager, describes Desktop Capture as both fast to implement and simple to use. He says Topicz uses it to scan batches of AP invoices, which saves time and effort, noting that "everything is automatically indexed while we key invoice data into our business application."

S4i also announced last week the introduction of a new desktop administration feature for its Express document management software.

It uses a series of automated profiles that monitor spool files and IFS folders on the IBM i operating system. It recognizes and captures documents as well as allowing the segmenting, indexing and adding of overlays those documents. Additionally, it provides a method for distributing the segments or entire documents via e-mail, fax, FTP, and other methods. It also adds document archival and retrieval facilities.

Out of the box, Express is typically shipped with a 5250 interface. As we all know, this can be somewhat cumbersome for new employees to learn the command line, option codes, and keystrokes.

Moving to a graphical user interface is the key attribute to the administration feature that's been added. S4i considers this to be an optional remote administration product. It is written in Java on top of an Eclipse foundation, which gives S4i a multiple-platform avenue in the future. The desktop administration feature currently runs on Windows and Express runs in the IBM i environment.

The advantages beyond ease of use for those unfamiliar with the IBM i and its predecessors. It incorporates features such as content suggestion, drop-down menus, and point and click selection processing that speeds workflow. For monitoring, it provides "at a glance" administration of profiles. When error alerts arise, it allows quicker debugging. It also is conducive to multi-tasking--using multiple screens, for instance.

Windows system requirements are the XP or newer operating system, 250 MB of memory, 150 MB of hard drive space, and a network connection to the IBM i server. On the host side S4i Express 3.0.1 PTF 20 or newer is required. There is no additional charge to the price of S4i Express when the graphical interface is chosen to replace the green-screen interface.

One more bit of news from S4i relates to its disk management product, DASD-Plus. The three products--DASD-Plus, DASD Alert, and DASD-Plus Chart--in this field are now bundled into a product suite. These products combine to provide diagnostics, analytics, and alerts for monitoring disk spikes, IFS management, clean ups, file reorganizations, optimizing disk space, and forecasting disk requirements.