

### **Enterprise Content Management**



# SmartTouch ECM



### **Enterprise Content Management**

#### Fast and secure report delivery at a mouse click

Managing the output from the myriad of today's processing platforms across distributed environments is becoming an increasingly challenging task to most, if not all, medium to large-sized business organizations. In fact, with the advent of e-business and online applications and the associated requirement to deliver results instantly around-theclock, there is no doubt that finding a failsafe means to control organization-wide output centrally has become as essential to the bottom line as system availability and performance.



The challenge however is huge. In the typical multi-system, multi-application distributed environment, output is produced in a vast array of formats for a great diversity of users and is archived and printed in many locations

throughout the organization. Although access and delivery routes can be set up between one location and another, the amount of time it takes to locate the output needed and the risk of loss before it reaches ist destination is so great that basic service level guarantees cannot be delivered. Therefore, with today's large-scale applications spanning a variety of different platforms and producing business-critical information that needs to be delivered instantaneously and securely across the organization and beyond, to suppliers, partners and customers, the implementation of a centralized, web-based and highly reliable output management solution is key to e-business success.

ReportSafe offers you a comprehensive and robust web-based output management solution that provides all the benefits of centralized output archival and distribution. Furthermore, ReportSafe meets all the requirements of online business environments: performance, flexibility, scalability, security, speed of implementation and integration.

Able to centralize and store output from any source, including UNIX, NT, AS/400 and OS/390 (zSeries) systems, ReportSafe allows reports to be distributed via email and fax, printed or viewed globally via the Internet in an unlimited number of document types (PCL, PDF, Word, Excel, PowerPoint, Project, PostScript, ...).

ReportSafe also enables ASCII reports to be easily downloaded into Excel documents and PostScript files to be converted to PDF format. Its uniquely flexible and secure two-step archiving system allows online viewing of reports by authorized users for a pre-determined length of time before automatically moving the reports to the appropriate devices for long-term archival. All reports are automatically indexed to ensure easy and fast access to the right reports, or any specific section of a report, to significantly reduce retrieval and research time and eliminate the risk of report loss or unauthorized access.

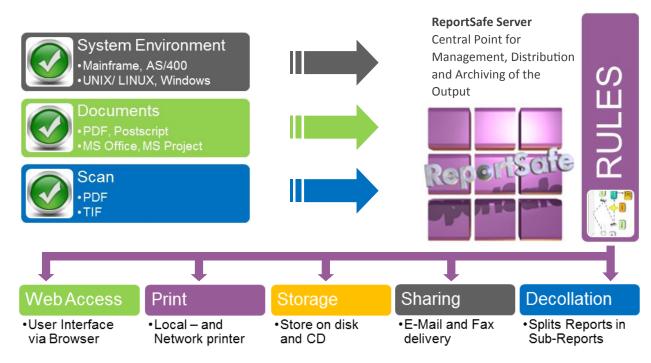
In addition, with its WebNotes and approval routing capability, ReportSafe enables you to make your own notations on reports for private or public viewing, and track and speed the approval process.

ReportSafe seamlessly integrates with an extensive range of systems and networks and can be installed within minutes. As no host programming or scripts are required, ReportSafe can be fully effective in less than one day.

*"Our capital expenditures are now electronically routed, approved, and tracked on-line. The expenditures are processed in hours instead of weeks."* 

### **File Formats and Destinations**

#### **Report Delivery from any Source to any Destination**



ReportSafe offers a comprehensive organization-wide solution to output management to ensure fast and secure report delivery from any source to any location in the format of choice. By centralizing and automatically indexing the online storage and archiving of all types of output, ReportSafe allows you to access the exact reports, or report sections, you require from any point in time within seconds for viewing via the Internet or distributing via email or fax, or to any Windows-networked printer. This eliminates the risk of lost reports and unauthorized access, significantly reduces disk storage requirements and printing costs, and saves huge amounts of time in searching for critical reports across the various platforms.

- Instant report availability from any source for online viewing
- Report distribution via email, fax and printing
- "WebNotes" and approval routing capability
- Report retrieval by sections and subsections
- Secure user access authorization
- Significantly reduced disk storage requirements
- Significantly reduced printing costs
- Fast and easy implementation, no additional programming
- Enhanced web security
- Full text search within ALL Documents
- eMail archiving and direct access

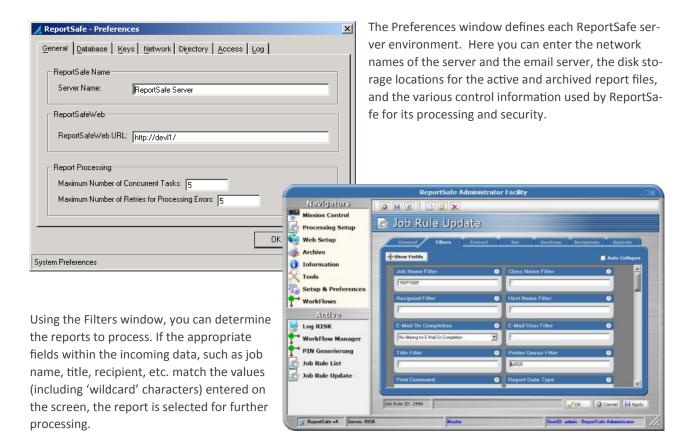
"After careful comparison between ten potential output management solutions, ReportSafe proved itself to best meet all of our key requirements, including cost effectiveness and ease of use."

Rhonda Young, Project Manager, Corporate Applications, Stephen Gould Corporation (a major US packaging technology developer and services provider based in New Jersey, with locations across the United States, Ireland and Mexico)

### Flexible and easy to use

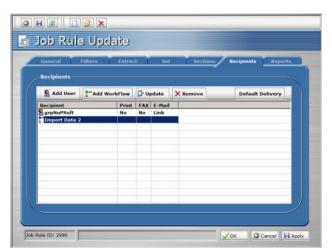
Acting in much the same way as a printer, ReportSafe can quickly be installed to receive all output from across your various processing environments, without requiring any host programming or scripts. All incoming data is automatically analyzed and indexed based on customizable identification and parsing rules and then stored in the ReportSafe central online or offline repository.

From any designated web-based management console, you can easily define and customize the ReportSafe control parameters and processing and security rules for each application, user group and processing environment.





From the Recipients window, you can specify how a processed report or report section is to be delivered to individuals requiring email, fax or printer output. The email recipient can receive the entire report or just a hyperlink to the report in the ReportSafe server (to minimize electronic mailbox storage and network traffic). The Set window allows you to change a report's job name, title, and recipient in the incoming report identification data or provide the values, if they do not exist. You can also specify the length of time (up to 89 years) to keep the report in an active and/or archive file.



## **Decollation of large Reports**

With the ReportSafe decollation facility, large reports can be broken down into smaller, more manageable reports so that only the specific pages required can be sent to the correct recipient. You can define a retention period, target device and user directory for both secure online and offline storage for specific report sections. In this way, users can immediately access the current or historical data they require without needlessly scanning through entire reports or wasting printing resources.

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From the Reports screen you can specify how each incoming report is to be separated or 'decollated'.

Each sub-report can be directed to different individuals or group, stored and archived for a different period of time, and processed in greater or lesser detail than the others. Decollation is commonly used to break a report when a department or company name changes; each sub-report is then automatically delivered to the appropriate recipient.

New Report Rule



All access to reports is protected by the failsafe ReportSafe user access authorization system that attributes viewing and access rights automatically to each report as it is received by ReportSafe, based on pre-defined rules entered by authorized personnel. In this way, data security is safeguarded across the organization to meet the stringent requirements of any e business environment.

**О**К

Cancel 🛃 Apply

### **Huge Savings in Time and Resources**

Using any popular web browser, you can call up specific reports or report sections based on a wide range of easily definable selection criteria. Provided you have the correct authorization, you can just point and click on report titles to gain instant access to current and historical reports from across the organization, via the ReportSafe central repository, in their original format or by importing them into a format of choice, such as an Excel worksheet. From the web browser, you can forward the reports by email or fax to designated users, or to any Windows-networked printer. Notification of report completion can also be emailed to the appropriate users together with a hyperlink to the ReportSafe online repository. This greatly reduces electronic mailbox storage and network traffic.

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you straight to the report itself. Section names of a multi-section report appear on the left-hand side of the screen, as bookmarks; clicking here brings the right section in view. Vertical and horizontal scroll bars enable you to navigate through the data for fast online viewing.

Hayoutselec - Microsoft Internet Explo... IN You can also view the ReportSafe audit and history log that follows each report even into archiving. Each log shows the date and time of report creation and all distribution events (email recipients, where printed, report source, etc.).

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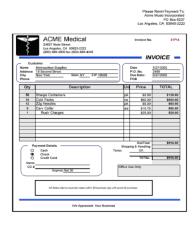
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Using the ReportSafe WebNotes facility, you can make electronic notations on reports for your benefit (private) or communicate information to your colleagues (public). You can also route your documents for approval processing. A color-coded date/time stamp and a message indicates if a document has been approved or rejected.

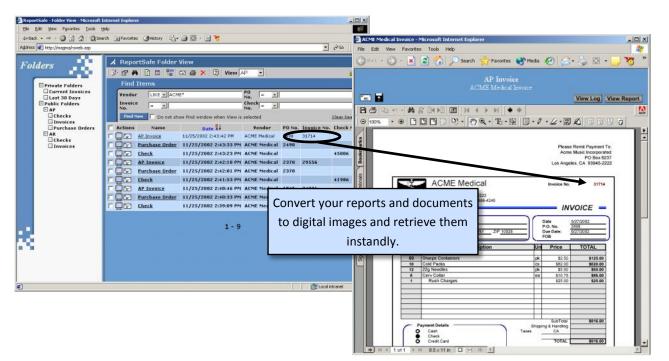
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A complete imaging solution that is cost effective, feature rich and will grow with all your needs.



**RS ImageManager** handles scanned documents and performs data recognition, validation, advanced image processing, and indexing functions. The indexing includes full support for OCR (Optical Character Recognition), ICR (Intelligent Character Recognition – hand printing), OMR (Optical Mark Recognition) and both two and three-dimensional bar code recognition. Optional conversion to PDF provides full text search capabilities on indexed documents.

**RS ImageManager** provides unlimited indexing, associates the index value with the documents and organizes them. Using data recognition, documents are easily indexed to meet your needs for future retrieval, allowing you to conveniently access the documents based on your desired search criteria.



RS ImageManager integrates with the ReportSafe framework, which provides the back-end document management solution. ReportSafe processes the image files sent from RS ImageManager and lets you determine how each document should be properly stored, burst, distributed, and viewed, at processing speeds up to 700% faster than competitors.

ReportSafe provides the user with the ability to view the documents and organize them in public or private folders. ReportSafe's unique ability to store unlimited document types provides a flexible solution that grows with your needs. Store electronic documents, reports, scanned images, and miscellaneous files and securely maintain them in their native forms.

These documents are presented (entirely or segmented) to authenticated Web Browser users or to recipients through E-Mail, FAX, and remote printers. Built for data volume and user scalability, ReportSafe cost-effectively serves companies of all sizes and supports industries as varied as healthcare, manufacturing, distribution, retail, public service, and entertainment.

### **Integration of Existing Application**

#### Enhance the functionality of ReportSafe - with RS QuickDraw and RS AutoIndex

Whether you use your favorite GUI application or logged onto a mainframe CICS application, with voice commands or a touch of key, RS QuickDraw finds and displays related images based on information from your existing application screen. RS QuickDraw retrieves electronic documents that are associated with the screen fields currently in view.

It gives any Windows or 3270 application instant access to the electronically stored documents and reports in ReportSafe.

Imagine you're in the AP system with an invoice number displayed on the screen; you press the RS QuickDraw hotkey and the scanned image of the invoice appears. As you view the invoice, you have the ability to make annotations on the document.

Attach a WebNoteTM indicating the W9 information is required from this vendor, then electronically route this document to a co-worker. RS QuickDraw makes this seamless integration happen without programming and without product dependent APIs. N Accounts Payable X Voice activated! Accounts Paym Batch Date: 06/03/2002 Batch Nbr: 486 Voucher Nbr: 62724 Vendor #: 48123780 ACME Medical Invoice Date: 05/27/2002 Invoice #: 31714 ACME Favorites 🜒 Media 🚱 🍰 🎍 🔯 🔹 3 = View Log View Report い· 典系 24 10 回 14 4 BAB 4 + Δ 000 閉必 Display related images from your current application with voice commands or a touch of a key. Reduce research time, lost documents and storage cost. INVOICE . Cash Check Credit ( TOTAL

**RS AutoIndex** was developed as an innovative approach to automate the manual process of indexing imaged documents. Imaging solutions for known document layouts are great, but what do you when you have to scan dissimilar documents like AP invoices? Scanning thousands of documents is a time consuming task, and to properly index each document for future recall and research is a problem faced every day. **RS AutoIndex** is the tool that lets you avoid all the re-keying of index information. You save an extraordinary amount of the time while increasing accuracy.

ReportSafe supports Secure Socket Layer (SSL) connections to prevent unauthorized access. Data encryption capabilities provide a safe environment, and Single Sign-on eliminates the need for users to manage multiple passwords and logons. Security may be tailored for each individual user and group; with the flexibility to limit a user's actions, you can deny a user's permission to E-Mail documents, or designate a user as having only view access (read only). A message is recorded in a detailed audit log for each access and all actions performed on a document; the user ID and a date/time stamp is logged when a document is E-Mailed, printed, forwarded, etc. ReportSafe also offers multiple levels of security administration.

"As a result of implementing ReportSafe, we have electronically stored over a million documents and saved over \$43,000 a year in paper cost. This does not include the additional savings in postage and labor required to distribute the management reports throughout the country."

## **Automation with RS WorkFlow**

#### RS WorkFlow - a complete Business Process Automation

**RS WorkFlow** is an automated means to seamlessly incorporate your policies and procedures into your staff's daily activities. WorkFlow automation eliminates routine decisions, redundant tasks, and maximizes your employee's efforts for decisions best suited to their expertise.

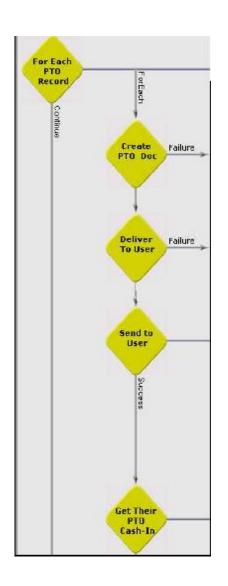
**RS WorkFlow** is the solution that enables you to automate these critical decisions with confidence and ease.

#### **RS WorkFlow Advantage**

The automation of business processes guarantees the effort required to generate these procedures is not just sitting on a shelf. Prevent exposure to non-compliance issues or mishandling of your business information, which can impact your revenue. RS Workflow automates the routing of all types of business documents and information to eliminate time-consuming, cumbersome, and error-prone tasks.

Save significant time each day by automating tasks. Additionally, minimize the impact on your staff when policies and procedures change. Protect them and your companies assets from overlooking critical steps in a process and gain:

- Productivity streamline your process and eliminate redundant and time-consuming tasks.
- Accuracy eliminate error-prone tasks, oversights and training
- **Consistency** automation guarantees consistent practices among employees
- Flexibility instant compliance with quick WorkFlow changes
- Standardization improve management of business processes achieved through standardizing working methods and the availability of audit trails



"ReportSafe is proving vital in speeding report delivery across our entire organization. The product's flexible viewing and download capabilities are providing significant savings in report retrieval time and printing costs, so much so that we expect to achieve a full return on investment in less than a year. Our stores now receive their monthly department financial statements five days faster!"

> Robert Agostini, Director of Internal Audit and Performance Reporting, The Penn Traffic Company (a leading food retailer in the eastern United States with 220 supermarkets, and wholesale food distributor serving 160 retail outlets)

### Why RS WorkFlow?

The term "WorkFlow" is defined in a variety of ways, and products vary greatly. Often products are nothing more than an approval routing process. When a WorkFlow solution is implemented it may meet the needs of the company at that point in time. The goal of RS WorkFlow is process automation, but processes will certainly change. This requires customization and flexibility on the part of the WorkFlow application. Therefore, a serious consideration should be the ease at which a WorkFlow solution's can easily adapt to change.

RS WorkFlow is adaptable, easy-to-use, and offers a graphical user-friendly facility. This graphical interface allows users of all levels to understand and automate a variety of solutions. Some products will restrict you to pre-defined WorkFlows that are difficult to change, or require extensive training courses. RS WorkFlow offers a fast and thorough implementation that has a lower-cost-of-ownership. Demand a solution that is scalable, adaptable, and intuitive. Our enterprise design guarantees a seamless integration with your existing environment.

#### **Pre-defined and New Workflows**

Pre-defined WorkFlows are delivered with SmartTouch solutions. Pre-defined WorkFlows expedite implementation, setup, and training. The ability to add new WorkFlows with our user-friendly RS WorkFlow Facility allows you to easily address and automate new WorkFlow processes, both simple and comprehensive. There are numerous similar processes across corporations. However, in most cases each company has unique differences and a WorkFlow can be created or modified to accommodate those differences.

#### Standard vs. Ad-hoc Workflows

Standard WorkFlows are processes that followed a pre-determined path. Ad-hoc WorkFlows can be triggered based on a decision that is best suited for a person's analytical ability to determine the next step. Interactive capability provides the flexibility to balance the best use of the system speed and accuracy of pre-defined WorkFlows, and incorporate the experience and expertise of the human element.

#### SmartTouch Solutions

- SmartTouch AIR: Analytical Image recognition for intelligent OCR/ICR from Documents
- SmartTouch AP: AP invoices Automate standard or comprehensive AP document processing for PO, non-PO, and miscellaneous invoices
- SmartTouch T&E: Travel & Entertainment Enter T&E expenses on-line and route for approval, then onto AP
- SmartTouch HR: HR New Hires Automate the time intense new hire process and benefits calculations
- SmartTouch PO: Requisition Enter purchase requisitions on-line, route for approvals with speed and ease

#### **RS Workflow-Facility**

The Enterprise WorkFlow solution extensive capabilities enables automation to all types of company processes and information. Included are numerous processing options such as: routings, approvals, escalation, database validation, database updates, (bi-directionally data exchange with external databases and business applications), calculations, linking, E mail, FAX, complex printing, comparisons, business transaction processing, electronic signatures, audit trails, and unlimited information management (e.g., reports, documents, images, web pages, multi-media, and much more). Users can easily locate archived electronic information with folders or advanced searches folders.

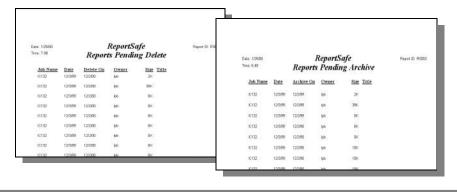
Also, monitor the status of a process, with our dashboard identify the Workflow lifecycle and delay points.

The SmartTouch Enterprise Information Management offers the best long-term solution for secure management of your information.

### **Secure Documents**

#### Secure current and historical reporting

The ReportSafe optional two-step archiving system allows online viewing of reports by authorized users for a predetermined length of time. ReportSafe constantly inspects the time-stamp of each active report or report sections and automatically moves them when appropriate to compressed disk, CD or DAT tape for long-term archiving. On request by an authorized user, ReportSafe can quickly return reports or reports sections to the active database for online viewing. ReportSafe comprises a series of highly effective storage monitoring tools to track your disk space and archived reports. Online status reports allow you to closely monitor the online and offline storage activity and so enable secure and timely report purging, thereby optimizing available storage space and resources.



#### Q: JUST WHAT ADVANTAGES DOES REPORTSAFE OFFER OVER OTHER AVAILABLE OUTPUT MANAGEMENT SYS-TEMS TODAY?

A: ReportSafe offers the powerful and unique combination of compatibility, flexibility, scalability, speed of implementation and security required by today's e-business environments; secure centralized control of report viewing, archiving and distribution; and the Internet viewing capability of reports and specific sections of reports from whatever source and delivery to whatever location.

#### Q: DOES REPORTSAFE REQUIRE CLIENT SOFTWARE TO BE INSTALLED?

A: No. In today's large and dispersed user communities, the installation effort is greatly reduced since no user client is required.

#### Q: HOW DO YOU INTERFACE REPORTS TO REPORTSAFE?

A: The unique ReportSafe architecture offers unmatched compatibility. ReportSafe simply appears as a printer to your application programs so that no host programming or scripting is required. The incoming data is analyzed and processed according to pre-defined rules.

#### Q: WE ALREADY HAVE REPORT VIEWING CAPABILITIES AT PLATFORM LEVEL. IF WE BRING IN REPORTSAFE, WOULD THAT MEAN THAT REPORTS WOULD BE STORED TWICE, THEREBY DOUBLING OUR STORAGE COSTS?

A: Most existing platforms provide temporary report viewing and storage, or are limited to maintaining only one type of report (i.e. EBCDIC, ASCII). ReportSafe serves as a long-term organization-wide archive for over thirty different file types. The report indexing only allows authorized access to the appropriate user(s) and eliminates the need to store multiple versions of the report. Also ReportSafe automates the report migration and retrieval from secondary storage, decollates reports and distributes them via email, fax, printing and the Internet, in addition to giving the user the ability to download reports into Excel with just a click of the mouse.

#### Q: WITH MORE THEN 10,000 REPORTS IN OUR ORGANIZATION, WOULD WE HAVE TO DEFINE AN EQUAL NUMBER OF REPORT RULES OR CAN RULES BE RELATED TO MULTIPLE REPORTS?

A: The ReportSafe generic rule processing can reduce the report set-up and maintenance time required. One rule can process an unlimited number of reports.

#### **About NuPSoft**

NuPSoft is a sales, marketing, development and support organization that provides robust and proven "State-of-the-Art" business solutions on a worldwide basis. Founded in 2002 by a group of experienced multinational software distribution and IT professionals, backed by a highly skilled team of developers and engineers, NuPSoft has the expertise and market knowledge required to identify, develop, distribute and support high quality and effective IT solutions that meet the fast evolving needs of today's major business organizations. We consider our customers to be our partners, which we provide with consultation, products and support continuously. NuPSoft has the objective to be an important supplier of software solutions, services and technology integrations in all fields. To reach this goal we co-operate closely with our worldwide reputable partners of the IT industry. Apart from security, stability, user comfort and performance of our solutions we put our special attention on short development cycles with customer oriented adaptations and/or developments. Up to now the company has sales and support offices in Austria, Germany and Switzerland. From our locations we run the sales, the support and the 24x7 support for the following regions: Western Europe, Central and Eastern Europe,

Middle East and South Africa.

www.nupsoft.com

#### **About Ascend**

Ascend Software is a privately held computer software development company that delivers superior solutions to help workstation, mid-range, and mainframe computer systems efficiently work together. Our software solutions are unsurpassed in performance and functionality.

www.ascendsoftware.com



NuPSoft Austria, Phone: +43 (0)1 7 96 38 10-0 NuPSoft Germany, Phone: +49 (0)20 58 89 70-00 NuPSoft Switzerland, Phone: +41 (0)44 365 79 79

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