Robot/REPORTS®

Report Management For Your System i

Robot/REPORTS—The Total Solution For Managing System i Report Output

Join Over 3,500 Users and Reduce Your Costs Now

The process of report management includes many tasks. Your computer room staff has to run, print, burst, sort, and deliver reports to recipients. After recipients finish reviewing reports, they have to deal with the issues of report storage. And, during a report's lifetime, a recipient may need to find and retrieve it many times. Because no area of IBM® System i™ operations is more costly or labor intensive than managing report output, you get the greatest payback by automating this process. Robot/REPORTS provides the total solution to the problems and high cost of report management.

Enjoy Enhanced Online Report Viewing

Robot/REPORTS provides elegant online report viewing to help report users switch to online viewing using workstations, PCs, laptops, and PDAs.

All users can freeze page headings and columns during windowing and scrolling, just like in a spreadsheet. They can highlight report information in color to call attention to action items. And, they can use scan functions to find items fast.

Authorized users can reformat their reports online by eliminating, moving, or copying report columns. They can save their new view definitions as report views.

The report administrator can add security to report views to restrict access to certain information.

Automate Operator Report Duties

Virtually any procedure an operator does in reaction to information in a report, Robot/REPORTS can do automatically.

Robot/REPORTS can burst reports electronically into report segments. For example, Robot/REPORTS can burst a report into a new segment whenever a department changes, or create a report segment that summarizes results by displaying only the lines containing totals.

Robot/REPORTS can even create new reports from old by including only the lines of pages that a recipient needs.

You can secure any report segment, or view, so that access to certain lines, columns, or pages is restricted to authorized users. And, you can use Robot/REPORTS with Robot/ALERT, Help/Systems' System i messaging software, to send a text, pager, or e-mail message to experts in response to report information.

Eliminate Manual Report Bundling And Distribution

If you have problems sorting, delivering, or losing reports, Robot/REPORTS is for you. Robot/REPORTS automatically bundles all reports (including segments) into a recipient packet and generates a packet cover sheet with an index. The index lists the reports in the packet, the number of pages in each report, and the packet page numbers. You can print the report packet at any printer in your System i network. Robot/REPORTS even handles laser printers with special print command requirements, so you don't have to change your report programs.

Choose From Multiple Report Archiving Options

Robot/REPORTS can archive any System i spooled file so you can have a different archive strategy for each report. Tell Robot/REPORTS how many days you want the report to be in each archive stage and Robot/REPORTS does the rest.

You can store reports three ways: online for instant access; compressed on a disk drive, optical drive, dedicated tape drive, or tape librarian (if you have Robot/SAVE, the automated backup and recovery software) for short-term storage; and in a compressed format on tape for long-term storage.

The Report Archive History shows the archive status of the report and the tape volume where it is stored. If you need a report from short-term storage, you can restore it by pressing a key.

See Complete Report History

Robot/REPORTS provides a complete history of every report it processes, whether printed or archived. It also gives you the status of every report currently being processed. And, if processing is interrupted, you can restart it without rerunning the report. From the report access history display, you can see who viewed or printed the report, and when. You can use report access history to review report usage.

We Speak Your Language

Report processing and output that uses different symbols or currency is no problem. If your finance database lists amounts in British pounds, Robot/REPORTS can output your finance reports in pounds. If your parts file contains special characters, Robot/REPORTS produces your inventory report using those special characters.

Robot/REPORTS lets you see critical report information quickly.

The Paperless Revolution Saves Money And More

Paper Costs More Than You Think

A paper reduction program can reduce your operating costs dramatically. When a large corporation conducted a study, they found that it cost 10 cents a page to print their reports. These are the items they tallied:

Material costs

- Paper
- Printers
- Printer maintenance
- Ribbons (impact printers) and toner cartridges (laser printers)
- Floor space and cabinets for storage
- Paper disposal

Labor Costs

- Operator during off-shift hours to watch printers and change paper
- Operator to sort, collate, and deliver reports
- Filing and retrieving reports
- Paper disposal

To determine your company's paper costs and how much you could save by online report viewing rather than printing, see the table below.

Each page viewed, rather than printed, can save you money. For example, if you currently print 50,000 pages a month and convert half of that to online viewing, you save $30,000 a year.

The Key To Your Paperless Revolution

Robot/REPORTS can help your paper reduction program in three ways:

1. Online report viewing versus printing.
2. Online report archiving versus paper storage.
3. Using report segments to print only the lines, or pages, actually read.

Using these features as part of your paper reduction program translates to savings that can pay for Robot/REPORTS in just a few months.

Join The Paperless Revolution

Many users can't wait to use Robot/REPORTS and lose their stacks of paper. Others have to be convinced to give up their paper reports. Robot/REPORTS has the solution for each problem area of excess report printing.

Problem: Users only look for totals or results.

Solution: Use Robot/REPORTS to create a report segment that contains only the pages or lines of interest. Or, demonstrate Robot/REPORTS' powerful scan features.

Problem: Users are interested only in report details requiring management attention.

Solution: Explain report viewing and show users how Robot/REPORTS highlights, in color, the items in the report that need their attention.

Problem: Users request reports because they may need the information in the future.

Solution: Show them Robot/REPORTS' archiving feature and emphasize that they can print, or view, the report at any time.

Problem: Users suffer from report inertia—reports are printed because they have always been printed.

Solution: Stop printing these reports and put them in Robot/REPORTS' archive. In the following weeks, review the report access history. If no one is using a report, eliminate it.

Using Robot/REPORTS with your analysis will eliminate paper, save time, and provide better-quality service to your users—guaranteed.

Reduce Customization Costs

Robot/REPORTS makes everyone more productive by eliminating many requests to modify reports. Users can enter their own exception thresholds to highlight action items. Authorized users can modify the format of their reports by changing their report view. The report administrator can segment reports and format views to print only certain columns, lines, or pages, securing information to authorized users. And, since Robot/REPORTS uses the information in a spooled report, rather than the data in database files to make reports, there is less need to create report programs to access data.

Eliminating paper reports is good for your bottom line—and the environment.
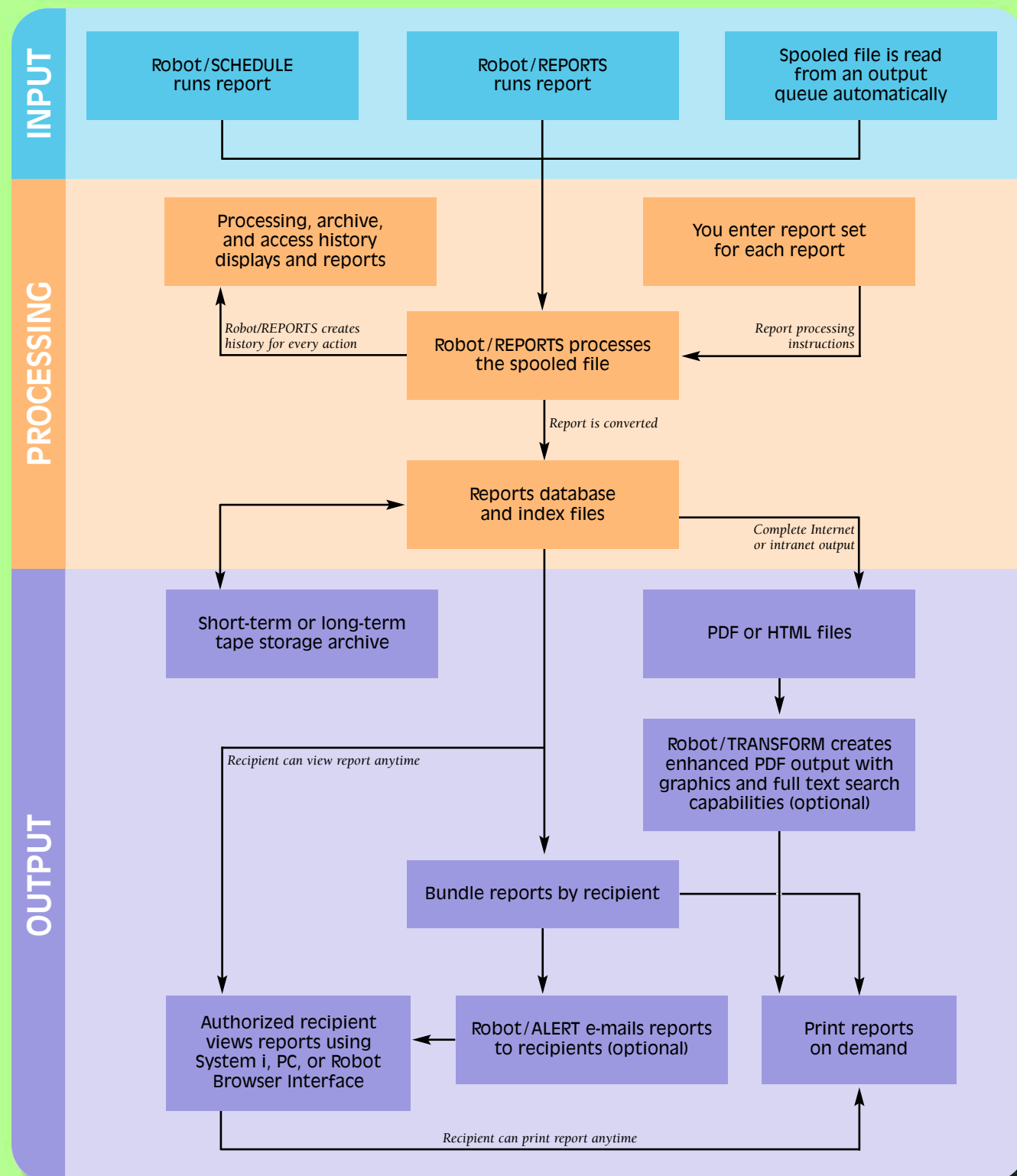
Present Monthly Cost / Paper Reduction Savings

Pages per Month	Cost	25% Less	50% Less	75% Less
25,000	$ 2,500	$ 625	$1,250	$1,875
50,000	5,000	1,250	2,500	3,750
75,000	7,500	1,875	3,750	5,625
100,000	10,000	2,500	5,000	7,500
150,000	15,000	3,750	7,500	11,250

Robot/REPORTS—The Ultimate In Output Management

INPUT

```
Robot/SCHEDULE          Robot/REPORTS          Spooled file is read
runs report             runs report            from an output
                                               queue automatically
```

PROCESSING

```
Processing, archive,                           You enter report set
and access history                             for each report
displays and reports

Robot/REPORTS creates                          Report processing
history for every action                       instructions

              Robot/REPORTS processes
              the spooled file

                    Report is converted

              Reports database
              and index files                  Complete Internet
                                               or intranet output
```

OUTPUT

```
Short-term or long-term                        PDF or HTML files
tape storage archive

                                               Robot/TRANSFORM creates
Recipient can view report anytime              enhanced PDF output with
                                               graphics and full text search
                                               capabilities (optional)

              Bundle reports by recipient

Authorized recipient    Robot/ALERT e-mails reports    Print reports
views reports using     to recipients (optional)       on demand
System i, PC, or Robot
Browser Interface

              Recipient can print report anytime
```

Solves Output Problems

Robot/REPORTS solves the major report output management problems:

- Robot/REPORTS eliminates the operator duties of bursting and sorting reports.
- Robot/REPORTS reduces the number of misplaced reports.
- Robot/REPORTS handles report reruns easily.

Provides Complete Report Handling

Robot/REPORTS processes report input according to your instructions:

- Robot/REPORTS can monitor queues to look for, and process, specified System i spooled files from any source.
- Robot/REPORTS can process a report and manage the output, automatically.
- Add Robot/SCHEDULE, Help/Systems' automatic job scheduler, to schedule report processing and manage output.

Using Robot/REPORTS to automate report processing requires no report program changes. In fact, it eliminates the CL programming that was needed before to handle these tasks. Just create a report set describing the report and its distribution. Robot/REPORTS does the rest. You get report output automation plus great report documentation.

A Window Into The World Of Report Processing

Robot/REPORTS tracks the history for each report being processed and reveals its status. You can see at a glance whether a specific report is currently being processed, whether processing is complete (including bundling), or whether reprocessing is being performed. You also can see information about the last time the report's processing status changed, the job that processed it, the size of the report, and the output queue Robot/REPORTS was monitoring. You have complete processing history at your fingertips.

A Wealth Of Output Options

With Robot/REPORTS, you get all the output options you'll ever need:

- Print copies normally with a banner page showing how many copies each person gets. Robot/REPORTS supports all kinds of laser printers.
- Convert a report to be output to microfiche.
- Bundle the night's reports for a recipient into an indexed packet and print it at the recipient's printer.
- Archive a report to online, short-term, or long-term storage.
- Add a report to a recipient's report list for viewing or printing later.
- Transfer a report to a PC in spreadsheet format.
- Generate a PDF file so the System i report can be viewed on any computer. Add Robot/TRANSFORM, Help/Systems' PDF conversion software, to create PDF files that are indexed for searching and contain enhanced, full-color graphics, including logos, images, fonts, and barcodes.
- Create a HyperText Markup Language (HTML) file that you can distribute anywhere on the Internet or your intranet.
- Use Robot/CLIENT,® the server operations event manager, or Robot/ALERT, the pager, text, and e-mail messaging software, to send report notification messages to pagers and cell phones anywhere. Distribute your reports as e-mail attachments to PDAs, cell phones, laptops, PCs, or other devices.
- Use all of these options for the same report. Create a distribution list of recipients that contains a distribution record for each recipient specifying the type of output they want. Robot/REPORTS makes sure each recipient receives the correct output.

Robot/REPORTS—Browse Your Reports Anywhere, Anytime

Instant Access
To Every Report

A benefit of online report viewing is the ability to find the report you want quickly. From your report list, you pick the report title and Robot/REPORTS displays all the archived report versions that are available to you. If the report is online, you can view it instantly. You can print the pages you want, in their original format, or in the report view format you select. If the report is not online, you (or an operator) can retrieve it quickly from short-term or long-term storage by pressing a key.

What The User Wants,
The User Gets

If a report is created internally, the layout usually reflects a compromise among users. If a report is generated from a software package, you are usually stuck with the lay-out. Rarely is everyone satisfied.

With Robot/REPORTS, you can reformat a report into different report views. You can create as many views as you want to suit different needs or changing priorities. For example, you can freeze headings and columns while viewing a report. Frozen headings stay at the top of the page as you scroll up or down. Frozen columns remain on the left side of the screen as you window left or right. You can move, copy, or even exclude columns from a report to group information and make reports more read-able. When you view a report, any columns you have excluded disappear.

When you are finished formatting the report, you can save it as a report view that you can change at any time. And, when you display a report, you can choose from any of the report views available to you.

Review Report
Information Automatically

Whenever you review a report, you use rules to ana-lyze and evaluate the information. If necessary, you take action. Robot/REPORTS automates this process. Use Robot/REPORTS' OPerator Assistance Language® (OPAL®) to enter your rules for reviewing report infor-mation. You can code rules for a report so that anyone looking at the report sees action items highlighted in color. For example, on your accounts receivable listing,

you could display all accounts over $10,000 and 90 days old in red. Plus, your users can enter their own rules for reviewing a report so that only they see the highlighted action items.

Great Interfaces Mean
Easy Report Management

One way to make the case for online report viewing and management is to show report recipients the wide vari-ety of online interfaces that Robot/REPORTS offers. In addition to the standard "green screen" System i interface, Robot/REPORTS offers both a Web-based interface—the Robot Browser Interface—and a PC interface.

Use the Robot Browser Interface for fast, easy access to your reports and other important information.

Access Report
Information Anywhere

If you want the familiarity of a Web browser combined with the ability to access multiple reports no matter where you are, the Robot Browser Interface is the answer. The Web administrator sets up users in logical groups and defines a Web page for each group. When you sign on using the Robot Browser Interface, your group's page displays and you have fingertip access to reports on multiple systems. You can display, print, and download your reports, add notes to reports, and make an active list of links to the reports you need to see often. Plus, you have access to all the information on your compa-ny's intranet or the Internet that you are authorized to see. Meanwhile, System i security guarantees that this access is secure.

Work With Reports Using
A Familiar PC Interface

You can use the Robot/REPORTS PC interface to view your reports, add notes, move, copy, or freeze columns and headings, and more. You can print reports, and download them to use in spreadsheet or other applica-tions. You can define report views to see only the portion of the report you need. And, you can do all this from any System i workstation or PC.

Easy
Document Retrieval

Robot/REPORTS can retrieve documents by invoice number, customer name, order number, or whatever you need to use. Plus, you can build report indexes for fast, easy organization and retrieval of information. And, you can use OPAL with indexes to integrate document retrieval into your applications.
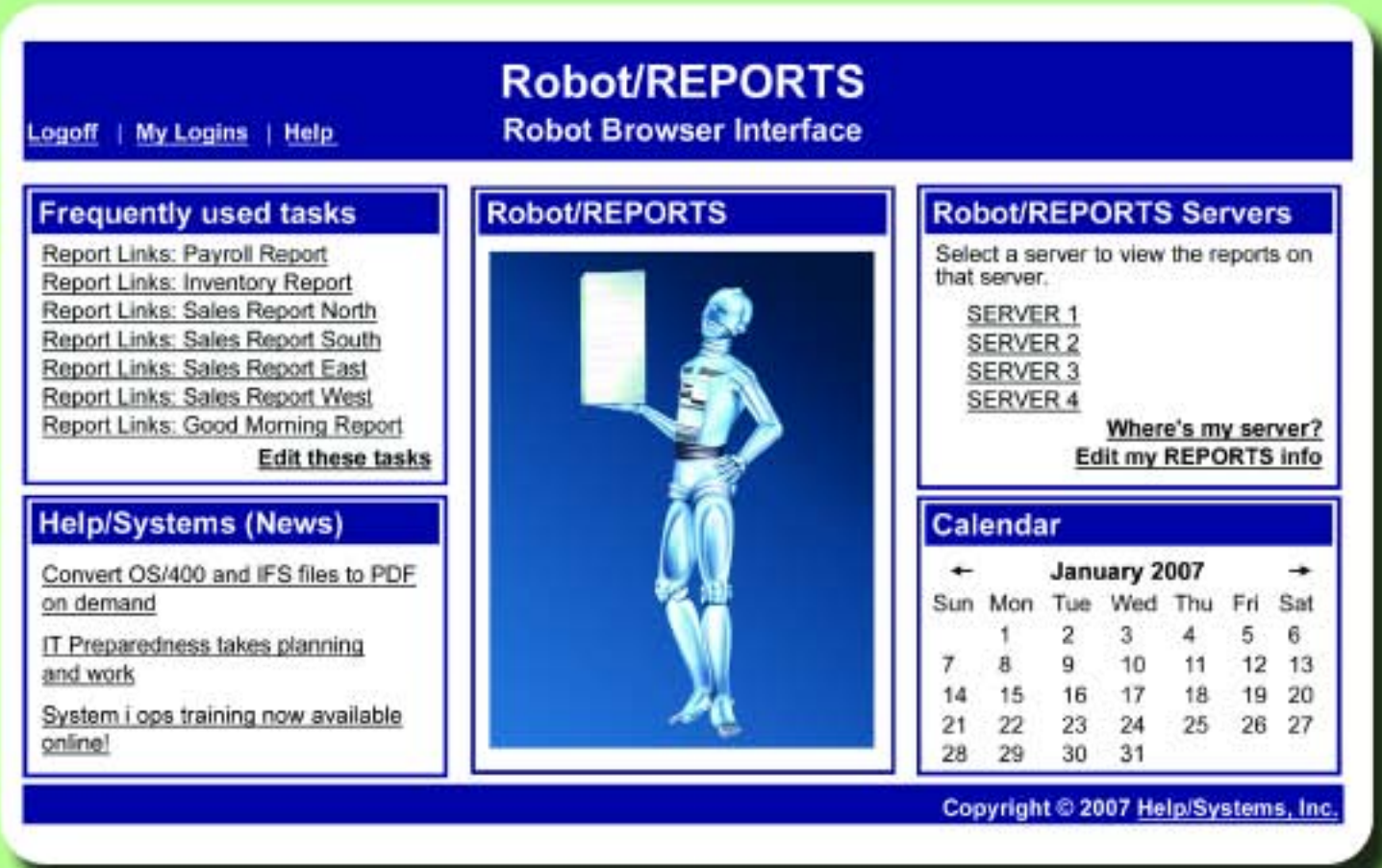
Fast
Powerful Searches

Report viewing offers you powerful search and display features to find important information quickly:

- Scan and display pages that have highlighted lines.
- Display only highlighted lines.
- Scan and display pages containing search values.
- Display only lines containing search values.

When the selected lines display, the report headings are preserved at the top of the display.

Controlled
Report Access

Because Robot/REPORTS stores reports in database files, rather than spooled files, you can secure the report information. Robot/REPORTS lets the report adminis-trator secure information down to the individual lines or columns of a report. They can control both the viewing and printing of secure information—users cannot display or print a report that's not on their authorized report list.

View, Print, Or Archive Now

Reports At Your Fingertips

What happens when you lose a report? First, you search through the stacks of reports on your desk. Then, you search your cabinets and file drawers. Finally, you ask Operations to rerun your report.

With Robot/REPORTS' archive, you select the report from your report list, choose the version, and access it quickly. It's easy to find a report to display or print. No stacks to search, no fuss, and no reruns. The Robot/REPORTS archive helps improve productivity company-wide.

Archive On Any System i Save Media

Robot/REPORTS can use any save media supported by IBM's save commands. As System i save options grow, your investment in Robot/REPORTS keeps pace. Robot/REPORTS supports three stages of report archive:

Instant Online Storage.
The report is compressed as much as 25% and stored online in a data library for instant viewing.

Short-term Storage.
The report is moved from the online library, compressed as much as 70% and placed on a short-term save device—disk drive, Auxiliary Storage Pool (ASP), IBM-compatible optical drive, dedicated tape drive, or tape librarian—that can do unattended restoration.

Long-term Storage.
Robot/REPORTS' long-term storage eliminates the need to store boxes of reports in a warehouse. The compressed report is shifted to a long-term save device, usually the one you use to do backups, and stored on tape. These tapes typically are kept for a year or more, sometimes off-site.

Robot/REPORTS makes it easy to set up a report archive plan. You just indicate how many days to store the report online, in short-term storage, and in long-term storage. Robot/REPORTS automatically moves the report from one archive stage to another according to your instruc-

tions. And, it keeps an archive history record for each report so you stay informed and in control.

Robot/REPORTS' automated archiving improves security, safety, and staff productivity. It frees valuable office and warehouse storage space, providing significant money savings for you.

Archiving As It Was Meant To Be

Robot/REPORTS has a seamless interface with Robot/SAVE, the backup, recovery, and tape management package. Robot/SAVE offers a backup class specifically for the Robot/REPORTS archive, providing complete flexibility to your archiving strategy. This is just another example of the integration available with the Robot Automated Operations Solution.

Less sophisticated archive software prevents you from viewing old versions of a report if the report layout changes. With Robot/REPORTS, the report is archived and restored with its search indexes and viewing formats. That means you can display any version of the report, no matter how often its layout changed.

Save A Bundle

Do you spend time in the morning bursting reports or report segments, and sorting and stacking them by recipient? Robot/REPORTS automates all this.

In bundling mode, Robot/REPORTS holds the report until Robot/SCHEDULE® executes a command. Then, Robot/REPORTS places the night's reports on the printers, grouped by recipient. From their report list display, recipients can change the printing order of the reports in their bundle. They also can create a bundle banner page that lists all of the reports in the bundle and the page ranges.

Robot/REPORTS can put the bundle page number at the bottom of each page, so the recipient can find a report in the stack. And, Robot/REPORTS can place the bundle

on any printer in your System i network. When recipients go on vacation, Robot/REPORTS can put their portion of the bundle on hold to avoid waste and save money.

Complete Report History For Complete Control

Robot/REPORTS provides a central point to view all processing history—processing, archive, and access—as well as user access to a report. You have complete control of your report management system.

- The Report Processing display provides an exact history of each report run during the day. While a report is running, you see exactly where the report is in the process. And, if a process is terminated accidentally, you can restart it without rerunning the entire process.

- The Report Archive display shows the archive status of the report: online, short-term, or long-term storage. It also shows where the report is stored, as well as its page and line counts.

- The Report Access History display shows who viewed or printed the report, including the time and date of access. You can view or print this history anytime to review report usage, and see whether reports can be eliminated or viewed online.

- Robot/REPORTS summarizes all its output activity in the Good Morning Report. This report chronicles report activity for the period you select. Make sure the Good Morning Report is on your desk when you arrive each morning.

You can easily view or print reports from online, short-term, or long-term storage.

Let OPAL Handle Your Complex Report Processing

OPAL Controls Your Reports

Most people are familiar with macro languages that generate display and report programs. Help/Systems created the first language—OPerator Assistance Language (OPAL)—to help automate the operation of your System i. In Robot/REPORTS, OPAL can read reports line by line, burst and sort reports, and even react to the information in a report. It replaces operator duties and handles the human function of reviewing reports to find items that need correcting.

Easy To Learn And Use

You can write OPAL procedures quickly. Because OPAL is so powerful, most report processing procedures take only a few lines of code. And, if your report set needs to make complicated decisions, OPAL gives you the power to code sophisticated procedures.

Build New Reports From Old Ones

Eliminating unneeded lines or pages from a report saves paper and time reviewing the report. Some report applications print reams of paper when all you need is a few totals. With Robot/REPORTS, you don't need the source code or the time to reprogram. You can create a report segment containing only the lines or pages the recipient needs.

OPAL uses powerful AND/OR logic to identify the lines or pages to include or exclude. For example, you can enter rules to determine whether management intervention is necessary. Or, you can use OPAL to compare report information with values in a table. The powerful combination of test logic and report segment operations in OPAL lets you create unique, custom reports for your users.

With Robot/REPORTS and OPAL, you can create new reports from existing ones. You can secure each report segment to limit viewing to authorized users. And, you can add a REMAINDER report segment to check your logic and report changes.

Automatic Balancing The Easy Way

If you have to balance report totals for your closing procedures, Robot/REPORTS OPAL is perfect. You can use it to convert a column of numbers into a numeric field, total report columns, perform arithmetic functions on columns, and compare the results. You can compare report totals and start the next job in the closing procedure when the totals agree, including totals from different reports. With Robot/SCHEDULE, you can even indicate the end of a prerequisite job so the closing procedure can continue. For example, you could start a job on an System i in Chicago based on a report that is run in Seattle.

With Robot/REPORTS OPAL, The Only Limit Is Your Imagination

Here are just a few of the things you can do with OPAL when you process reports:

- Page or e-mail an expert based on report information
- Call user programs to execute functions
- Send a message
- Execute a command
- Use Robot/SCHEDULE to determine the operator on duty, the date, the time, and more
- Signal the start of prerequisite jobs, or change the date on a job

With OPAL, the possibilities are unlimited. You can do everything from automatically searching reports for critical information, to automating your closing procedures, to executing commands or contacting experts based on report content, to highlighting key information for fast analysis and results. No matter what type of report processing you need to perform, from simple to sophisticated, OPAL provides the solutions.

It takes only a few lines of OPAL code to highlight report information.

Easy Code

Assume that you have a report containing critical information that you want to highlight. This sample OPAL procedure locates the information on lines 29 and 41, processes it, and highlights it in red.

Impressive Results

The final report, produced using Robot/REPORTS and OPAL, displays in the Robot Browser Interface. The key information from lines 29 (SALES REPRESENTATIVE RECAP) and 41 (TOTALS) is now highlighted in red for fast, easy reference.

With OPAL, you don't have to search through a report to find what you need—it's right there!

Robot/REPORTS and OPAL highlight critical report information for easy viewing.

Join The 21,000 Customers Using Our Automated Operations Solution

The Robot Automated Operations Solution

Help/Systems is committed to providing you with products that automate the operation of your System i, whether you have a single system or a network of them.

The products of the Robot Automated Operations Solution look and act the same. All products talk to each other through the solution's common component interface. This integration makes all the products very powerful, yet easy to learn and use. When used with our other products, Robot/REPORTS is much more valuable.

Commitment To Excellence

In 1992, Help/Systems became America's first ISO 9001:2000-certified software company and has maintainted this standard of quality ever since. This international quality standard covers software design, development, marketing, product support, and training. Help/Systems demonstrated that it has an excellent software quality assurance system in place, full management commitment to quality, and a well-trained and motivated staff. The certification applies to all company procedures for ensuring customer satisfaction—from those done by the receptionist to the duties of the CEO.

Learn More About Robot/REPORTS

Help/Systems offers regular training on Robot/REPORTS as part of our Educational and Consulting Services. Our ISO 9001:2000-certified training teaches you strategies and techniques for managing reports and report output. You learn how to automate report setup using Robot/GUIDE; define and manage recipients; view reports using the Robot Browser Interface; distribute reports using e-mail and HTML; and much, much more.

Learn more about Robot/REPORTS and the other products of the Robot Automated Operations Solution. Detailed class descriptions and schedules are available on our Web site at **www.helpsystems.com/education**.

Team Robot/REPORTS With Robot/SCHEDULE

Robot/REPORTS includes a seamless interface to Robot/SCHEDULE, the job scheduler and batch management system. Select the ROBOT option when you set up a report, and Robot/SCHEDULE automatically creates a report job for you to schedule. Then, Robot/SCHEDULE uses the sophisticated report distribution functions in Robot/REPORTS.

You also can use Robot/SCHEDULE's operations information in your report segmenting procedures. Using this information, such as work calendars and system-wide reserved variables (including operator on duty, or job date), helps ensure that you have one set of operating information controlling your system.

Team Robot/REPORTS With Robot/ALERT

Robot/REPORTS also includes an interface to Robot/ALERT, the System i event notification software. Robot/REPORTS uses Robot/ALERT to send a designated expert (or group of experts) a text, pager, or e-mail message, including attachments. You can use Robot/ALERT to send messages to any device, including pagers, workstations, laptops, PDAs, and cell phones. And, you can send messages across the Internet or your company's intranet. Robot/ALERT can notify recipients when their reports are ready, or e-mail their reports to them, automatically.

Team Robot/REPORTS With Robot/TRANSFORM

Use Robot/REPORTS with Robot/TRANSFORM, the i5/OS output-to-PDF software, to burst large reports by customer number, invoice number, and more. After a forms package graphic is applied to each section, Robot/TRANSFORM can convert each ASCII-format spooled file into a PDF file and distribute it to the IFS.

You also can use Robot/REPORTS with Robot/TRANSFORM to archive ASCII and AFP spooled files to tape. And, Robot/TRANSFORM can convert IFS files and all graphic spooled files created by applications that generate PCL, AFP, and SCS output.

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