

Single Person System i RPG Shop Produces Sharp, Secure Self-Service Portal for 1,000+ clients

Custom electronic debt collection activity reports are created, indexed, and archived automatically from System i spool files and securely accessed from the web in seconds by United Credit Services' 1,000+ clients.

An interesting thing about IBM System i technology is that it's highly self-sustaining. As an example, United Credit Service, Inc., in Elkhorn, Wisconsin, provides debt collection services for more than a thousand customers. The server it uses to manage its business is an IBM System i model 270, run by a single IT professional, Bruce Guetzkow, who is responsible for everything from strategic long-term systems planning to backups.

For several years Guetzkow discussed with other UCS managers different ways of improving customer service. The collections business, while an indispensable asset to organizations with lots of past due invoices, is also very competitive, so it's imperative to retain existing clients. To do this, UCS continually demonstrates its commitment to doing everything possible to improve each of the various stages of the collection process that culminates in collecting the maximum amount of overdue debts.

As part of the ongoing effort to optimize deliverables Guetzkow wanted to refine the way UCS reported its collection activity progress to the agency's clients. UCS printed reports generated largely by in-house developed RPG applications and to a lesser extent, from queries. These reports were converted to PDF's and burned onto CDs for each client. Then, the CDs were mailed or hand-delivered. "This process was labor intensive and costly both in terms of hourly costs and monthly delivery fees," says Guetzkow.



"I am the entire IT staff here. I manage the green-screen application, handle the ad-hoc requests, and enhance the system. That being said, I would never have the time to build a system nearly as complete as the one I created with Nexus, even if I put several years of time into it. I'm glad I discovered Nexus and Catapult. These products have pulled it all together for us in a very affordable package.

Bruce Guetzkow, IBM Certified Specialist, United Credit Service

The new system he envisioned would allow UCS' clients to access a self serve, secured extranet web portal to search and view their collection reports with the ability to download PDF reports they wanted. Initially Guetzkow considered developing a system by hand, as he has System i technology skills that he has been honing since 1985 and is familiar with HTML and JavaScript. He decided instead to look at possible third party solutions. "I was interested in the Nexus Portal solution with the ECM (Enterprise Content Management) feature that BCD offered license free," says Guetzkow. "As I looked more closely into the technology I discovered BCD also offered an integrated document management solution called Catapult that would allow me to automatically distribute, archive and index System i documents and reports directly into the Nexus ECM."

”I decided since we already licensed other BCD solutions (www.bcdsoftware.com) and were very familiar with the level of BCD’s service that it made sense to bring in both solutions for a thorough evaluation and see how well they could help improve our collection process.” said Guetzkow.

A Complete Toolbox

Nexus Portal is a System i hosted Web Portal solution that provides controlled, secured and organized access to Enterprise applications, documents, web menus, executive dashboards and user tools via web browsers. It includes an ECM (Enterprise Content Management) feature that allows the importation of documents, reports, spreadsheets, PDF’s, images, scanned documents, and others from a System i server or any connected PC network drive to be added to the ECM. Search indexes can be automatically extracted from reports, invoices and documents and added to Nexus ECM to facilitate retrieval by using Catapult, or search indexes can be manually added by users when adding documents, images, and other objects to the Nexus Portal ECM.

Nexus provides a professional looking site with secure login and drop down menus without requiring any HTML or coding knowledge. It also manages users and groups of users that you attach as authorization lists to reports, pages, and menus in Nexus without requiring any coding.



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Catapult is a PC and System i Client/Server application that automatically distributes System i reports and documents as well as files stored on PC networks. In addition to having the ability to create PDF’s with or without forms overlays, Catapult also produces files with RTF, HTML, TXT or XLS extensions. These documents can be printed, emailed, faxed, or archived to any network drive. You can use Catapult as an integrated solution with Nexus Portal where Catapult auto-files and auto-indexes reports and documents into proper Nexus Portal ECM folders. Once in the portal, authorized users can easily view, search, retrieve, print and email documents.

UCS uses Catapult to split the System i spool files and add the appropriate report template overlay. Next, as part of the same rule, Catapult converts the result into PDF reports, reads specified data from the reports to create the search indexes and then auto-files the reports into specified client folders. Guetzkow says that Catapult initially automatically created over 1,000 such PDF reports and indexed each report using various data found in each report. Indexed information included customer numbers, invoice numbers, and order numbers. As a result, customers can now log in over the web through Nexus and search for and access reports that are in their respective secure directories without the risk of others seeing their proprietary information. To provide a completely secure solution, the Nexus portal uses SSL to ensure secure transmission of information.

You Can Do More With Nexus

While Guetzkow admits that most of his skills tend to orbit around the System i, he says it wasn’t difficult to put this system together because of Nexus’ powerful user-oriented design features: “I may not be a web page designer, but I can certainly build a nice client self serve portal with Nexus,” he says.

He has also set up this system to serve reports to internal users. Instead of placing reports for internal users in the ECM portlet he uses another Nexus portlet type that supports direct links to the IFS. This helps segregate even further internal reports from those accessed by outside customers. He places these reports in the IFS so Nexus can offer logged-in users direct links to those files. Guetzkow had a couple of requirements that Nexus didn't address straight out of the box, so BCD's product development team promptly addressed his needs. "I asked BCD to do a modification that would allow Nexus to collect statistics on visitors so we can track the rate of uptake for the new site. The portal is pretty new and we are trying to see how well it is being used by customers. Having these statistics gives us concrete proof of the level of use." Guetzkow adds that he has worked directly with the product developers and says they have been very responsive. "There are instances where they have sent me custom updates on the very same day I requested them."

There are lots of formidable small and mid-sized businesses (SMB) who use System i technology. In many SMB organizations, it is common for one or two people to manage every facet of the IT operation. Guetzkow is a case in point. "I am the entire IT staff here," he says. "I manage the green-screen application, handle the ad-hoc requests, and enhance the system. That being said, I would never have the time to build a system nearly as complete as the one I created with Nexus, even if I put several years of time into it. I'm glad I discovered Nexus and Catapult. These products have pulled it all together for us in a very affordable package."

Allowing customers to retrieve reports through a secured web-based portal is the first stage of a longer term strategy with Nexus at the hub. "The first step was to giving our customers direct access to their reports whenever they wanted to see them," says Guetzkow. "This is done and is now a standard process for us. Next, we're going to give customers on-line access to more information and take the Nexus Portal concept one step further. And as you might expect, other managers now have a nice list of other projects and ideas that involve customer self service to further improve our operations using Nexus and Catapult."



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