

Web Access

For A/R Documents

Imaging's Web Access module provides a simple way to give your customers 24x7 access to copies of their own documents, right from your web page. Instead of having to call your company and use up your accounting staff's time, they can get instant access to the documents they need anytime, 24 hours a day.

Some companies who have installed Web Access have reported that the number of in-bound calls to their accounting department has dropped by 50 to 100 calls per month. The time that used to be taken up responding to these calls can now be used for more productive tasks.

Web Access can be set up in two ways. It can be set up as a stand-alone web page, where the users log on to the Web Access page directly. Or, if your company already has a web portal for e-commerce, Web Access can be set up to run as a task inside of the existing portal.

In the first method, the user either clicks on a link on your web page or goes to the Web Access page directly. Before being given access to the page, the user must log in with a valid user ID and a password. There is extensive security in place to ensure that the user can only access documents in their own folder.

Once the user has been authenticated, they are shown a single web page which contains your company's name and logo, any other graphics you want, and a few "fill in the blank" boxes. The boxes are typically something like "Invoice Number", "Order Number", "Statement Date", and so on. You decide which documents you want your customers to be able to see.

The customer fills in the appropriate box or boxes and submits the search request. Imaging locates the documents that match the request, converts them into standard PDF files, and displays them on the web page. The user can then view, print, download, or save the PDF file.

In the second method, it is assumed that the user has already logged in to and has been authenticated by the web portal software. In this case, the web portal created the "fill in the blank" screen and the search request. The information in the search request is passed to imaging, which locates the matching documents, converts them to PDF format, and hands them back to the web portal for display.

Both options accomplish the same thing, namely, providing instant access to copies of documents. The only difference is which software is providing the security and the display functions.

In either case, a hosted web server is set up in ITG's data center. One of the obvious facts is that, for a server to be used by someone across the Internet, that server must be available to the Internet. Equally obvious, you do not want to have any of your live servers directly accessible by the Internet. All of your servers should be behind the firewalls and other security devices.

ITG has a very secure data center. ITG's customers include most of the Superior Courts in California, along with a number of hospitals. Both of these groups require that a very high level of security be maintained. The hosted web servers in our data center are protected by that same level of data and network security.

Every night, after the normal tape backup runs on your imaging server, a second, incremental backup is run which copies any new or changed data to the off-site hosted web server. This ensures that the hosted web server is always up to date. Whenever a customer makes a request for a document, they are only retrieving documents from the hosted web server, never from your own live imaging server. This protects your system and your data from any unauthorized access attempt.

An added benefit of this architecture is that it creates a built in disaster recovery plan. With Web Access, not only do you have the backup tapes from the nightly backups, but you also have a complete, full copy of all the data on a live server at a geographically remote location. Should there ever be a fire, a flood, a broken water pipe, or anything else that damages or destroys the live imaging server, all the data is safely stored and can be instantly accessed with no loss.

For A/P Documents

While most companies initially install Web Access to help the A/R department, it works just as well for the A/P department. There are a growing number of companies who now use Web Access for both A/R and A/P. On the A/P side, vendors are able to review copies of purchase orders, delivery receipts, and A/P checks on-line.

Just as with the A/R department, the goal is to reduce the amount of time required to handle questions from vendors. By giving vendors direct access to certain key documents on the Internet, the amount of time that must be spent by the A/P department staff can be reduced significantly.

The vendors do not need any special software or training. All of the documents are presented as standard PDF files on a normal web page. Any vendor with access to the Internet and with a valid user ID and password can view the documents in their own vendor folder.