Document Management

Document Management Systems - The Organisation of Business Data

There is an increasing need for more and more information in the form of text, images and other digital formats to be available immediately in every area of your business. All these can be regarded as different forms of documents. Typically, however, a single department or individual has access to only a small part of this information using manual methods, and that access uses valuable time[1]. The primary goal of a document management system is to establish a reliable administrative filing system for all your documents by providing storage and access with a low administrative burden, regardless of the type of document or its numbers.

How does proALPHA® accomplish this?

The above goal can only be achieved within a structured data storage environment. This means that every functional area of the business, for example, Sales, Engineering, Accounting, Manufacturing and Purchasing, must have access to this information. To achieve this goal, the proALPHA Document Management System (DMS) is built using industry standards. All document references are stored as records in a relational database (RDBMS) that serves as the structural foundation of the DMS.

Whether the records originate from engineering design, office administration, or any other area of the business, access is gained through proALPHA. Every employee works with the same familiar routines and Windows-like user interface, confident that the location of the required document will not change. Whilst initially documents are saved on fixed disk storage, any archived document can be stored on another form of storage media/device as well, for example, optical media in a Jukebox.

Further integration of the DMS with proALPHA WorkflowAutomation provides standard work sequences such as: Archive - Compress - Encode – Resubmit. Once stored, any employee can then view the appropriate documents directly from his/her desktop. Direct access to all documents in the system is possible from within proALPHA, and applications such as MS Office or CAD.

Technology is Vital

A database server is at the heart of the DMS. The server co-ordinates access to the database and manages all peripheral system equipment, such as the scanner, printer, and any optical storage media. It is also, where all initial system settings are made. Online access ensures a uniform database as well as the scalability of system resources. Centralised storage supports virtually unlimited growth potential for data volumes and is managed in a hierarchical structure, with data stored first on disk and then onto optical media or tape. The server's performance is improved by conversion, compression, and encoding programs and it supports all technological prerequisites for use with the Internet.

The front-end of the DMS is designed as a "thin client" in order to minimise the cost of the desktop. Text processing, for example, requires only a desktop with a small communication program to the DMS server to be fully integrated within proALPHA.

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[1] Professionals spend between 5% and 15% of their time reading documents - but up to 50% of their time searching for information. Source Gartner Group

MS Office Integration for Administrative Functions

Integration brings significant advantage to two types of end users: the user of MS Office and the user of proALPHA. A "pure" MS Office user can have access to all related information stored in the proALPHA database whether that is derived from master, workflow or MIS data. Administrative areas in proALPHA benefit as well, by accessing existing enterprise data. Master data is available, for example, whenever a customer document is created or some new sales data needs to be entered for a promising lead. All quality and consistency checks are carried out in real time.

The MS Office workstation need not be a proALPHA client. A proALPHA user can directly access an MS Office application from any proALPHA module. All current information, such as the order number, customer address or sales representative, etc. can be automatically transferred. For example, existing proALPHA address information can be copied to a heading when creating a document in Word. Furthermore, subject lines can be used to define additional search terms. Documents created in this way are automatically stored to the correct folder, which means, they are available when desired in a proALPHA application.

Newly created documents are available instantly for use by proALPHA, MS Office, and CAD users. This results in major time saving, and eliminates errors in "filing". Documents can be stored in a user's own folders or can be "mailed" to another user.

Of course, proALPHA WorkflowAutomation is a component of MS Office Integration.

COLD archiving of proALPHA documents

Many documents are created directly by proALPHA. The DMS makes it easy to automatically store these "computer generated documents"; invoices, shipping documents, orders or bills of materials can then be accessed and retrieved at some future date. You can determine whether a document is to be automatically archived when printed, what type of document is to be archived and the search criteria used for future access. Data is entered only once in the master data, which ensures the highest degree of automation possible when archiving your records with proALPHA DMS.

No more unstructured data with proALPHA Scanning

Many documents, such as sketches, hand-written notes, and brochures may exist only as paper. In order to be used in proALPHA they have to be converted into a digital form by being scanned.

The proALPHA DMS allows for scanning in a variety of ways. WorkflowAutomation in proALPHA separates the scanning process into two actions, "Scan" and "Assign". The simple mechanical process of scanning is accomplished by a workstation with a scanner attached and the document assigned to a department by a user using the "Assign" activity and entering the appropriate codes.

Scanned data can also be entered directly into a field in a proALPHA program. The document management system recognises the code parameter for archiving.

Storing of the record in the database is automatically carried out when all required data has been entered. Additional search terms can also added later to the stored record.

Document Recognition - Save time with automated assignment

Many documents, such as time cards, material requisitions or shipping tags contain encoded information such as a barcode, OCR or some other encoding technique. When for example a time card is scanned, the system automatically reads the coded information and automatically links it to the appropriate work order. Information contained on the time card, even hand written notes, is immediately available. Complete orders are archived in the system and can be further processed at any time.

proALPHA DMS - Every document is within reach

The Information & Controlling System (MIS) of proALPHA allows users in any functional area to access any document from a list of related documents. Search keys or keywords assigned at the time of storage provide extensive search capabilities. For example, it is possible to review the original sales order together with its associated purchase orders, work orders, bills of materials and assemblies at any time. Each document can be "found" using multiple paths. Once identified, a click of the mouse displays or prints the document; and integration with proALPHA WorkflowAutomation gives you the status of a document at all times.

Consider the enormous savings when all of your business data is well organised, held once, and once only and referenced in one central database.

Set your data free with proALPHA's Document Management System.