DOCUMENT MANAGEMENT

INTRODUCTION

The Document Management module within EFACS E/8 is a repository that provides quick, easy and efficient access to information in a secure, controlled and traceable manner.

Different document types such as contracts, specifications, quality standards, drawings, letters, emails and images may be held. Support is available for a wide range of formats such as Word, Excel, PDF, video, sound, images (JPG, MPG, GIF, etc.) and CAD formats such as DXF, DWG – in fact all formats supported within a browser environment.

The functionality within the software is not restricted to storing and viewing information. Revision management features and the ability to assign attributes to documents allow users to amend or interact with documents as part of a business process.

DOCUMENT ATTRIBUTES

Different types of document are created, each of these having user-defined attributes. Some of these attributes may be mandatory, others optional, allowing key information to be held against each document as appropriate.

Use of attributes helps enforce good administrative disciplines and facilitates subsequent search and retrieval.

For example, a document type may be created to capture incoming Purchase Orders. Mandatory attributes of Customer, Sales Order, and Sender may be defined, with an optional attribute of Project. An incoming electronic Purchase Order can be dragged and dropped from the User's desktop to be created as a new EFACS document. This is associated for example, with the relevant customer or sales order and becomes immediately available in a Documents tab accessible via the relevant Sales Order screen as well as the customer record.

AT A GLANCE

The retention, storage and accessibility of information within a business are critical to its efficiency, and will ultimately determine the speed at which an organisation responds to demands placed upon it.

Today, organisations need to effectively manage an expanding array of document types, from letters, memos and emails through to specifications, designs, CAD drawings and other specialised documents.

DOCUMENT GALLERY

The Gallery allows you to view documents including CAD drawings and embedded videos.

DOCUMENT MANAGEMENT

DOCUMENT REVISIONS

A number of revisions of a document may be retained. EFACS allows the history of changes to be reviewed through user-friendly previews of versions of the document.

Using EFACS Workflow, key documents can automatically be circulated for approval and revision. The initial revision may be circulated with each recipient having the option to review and possibly change the document. A changed document is held with appropriate comments against a new revision. If for example the document is a product specification, the latest revision will be shown in a Documents tab against the product, with options to view previous versions.

The browser capability of EFACS enables users to access documents anywhere in the world through an Internet enabled device, thus allowing staff to readily capture, submit, author, convert, share and find documents of all types while working anytime, anywhere.

INTEGRATION CAPABILITIES

The Document Management module links directly with Workflow to allow automatic document filing and document approval via tasks containing embedded documents which can be passed around individuals within a company.

Externally, customers and suppliers can be sent all relevant information through Communications Tracking, automatically picking up the email to be sent and attaching the relevant documents and files associated to it.

Documents such as quotations, specifications and sales agreements can be automatically attached to a supplier email by utilising the multiple referencing tools. These communications will be filed within the Communications tab for easy future referencing and to provide complete traceability. Incoming and outgoing emails are tracked and stored, whilst any associated attachments are stored as documents.

BUSINESS BENEFITS

- **Staff time is better utilised as associated documents are available where required.**
- **Improved retrieval time when sourcing information internally.**
- **Cost savings in paper and printing costs.**
- **Easier distribution of important documents to users.**
- **Full version control and traceability.**
- **Speed up business processes and enhance their quality.**
- **Document security provides better disaster recovery.**

MULTIPLE REFERENCES

EFACS Document Management adopts the attach once, reference many times approach. This allows any document managed by the system to be referenced against any number of the same, or different records. For example, one document can be referenced against a collection of parts, as well as customers, suppliers and any other type of record that is specified as an associated document reference.