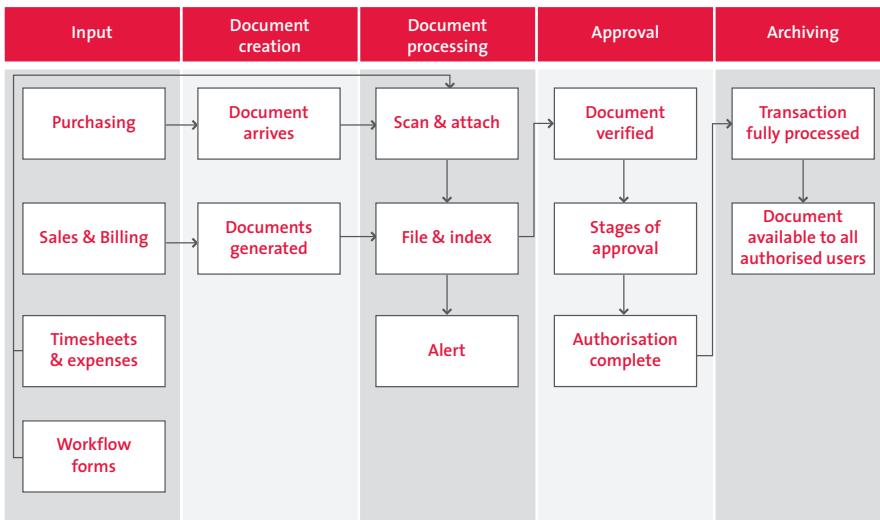


# Document management

Access Document Management reduces the cost of processing, storing, managing and retrieving your business-critical correspondence. Everything from board packs and purchase invoices to certificates of conformity and graphics can now be scanned, indexed, searched and checked in/out from a secure, space-saving electronic archive. Fully integrated with Access Dimensions, Access Document Management is easy to use and cost-effective to deploy so that you can use it in every part of your organisation.



## Document types

Access Document Management is flexible, enabling you to store any number and type of document. For example, financial statements produced in Word and Excel can be stored alongside general business correspondence such as emails and images. Any hard copies are quickly scanned and automatically posted to your chosen location within the store. With all your information in one place, you know exactly where to go, regardless of what you are looking for.

### Accessing your documents

Access Document Management is built on powerful Microsoft SQL-based technology, enabling you to work with large volumes of documents with ease. Documents can be expanded in full screen view or rotated if required to make them easier to read.

## Multiple databases

For complete visibility of your business information, can access information held in any Microsoft SQL-based database, not just those held in Access Dimensions.

### Web-based access

Utilising web services, every authorised member of staff can search and retrieve documents from their desktop, regardless of location. This boosts collaboration on projects, contracts and correspondence and helps provide instant answers to customer and supplier queries.

## Filing & scanning

### User Inbox

Each user has their own Inbox, where all imported documents arrive before being committed to the central store.

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A flexible filing structure makes the documents easy to manage. For example, you can create subfolders within the Inbox for specific divisions, customers or projects. Inboxes can also be assigned to Groups, allowing multiple users to file documents coming into the system. When a user is assigned as a member of the group, they automatically have access to the documents stored in the Group Inbox, or any of its subfolders.

### Filing your documents

Once in the system, 'tagging' documents will ensure that they're easy to retrieve. Tags are applied in just a few clicks, selected from intuitive drill-down windows. You can ensure that mandatory tags are included (e.g. company name) alongside any optional information (e.g. company geographic). A large number of default tags are supplied with each document, which can be added to/edited at will. Tag lists can also be driven from SQL tables, views or stored procedures, giving you unlimited scope for searching.

### Auto-filing & scanning

An optional Network Services module enables you process large volumes of documentation with ease. Barcodes produced in Dimensions can be printed and attached to documents such as purchase invoices and left to scan. Each scanned file is deposited on a network folder, which is constantly monitored. The system reads documents coming in and determines where they should be sent, for example, a specific user Inbox or a certain folder.

### Document identifiers

The filing process can be further refined through the use of document identifiers. These enable you to build additional information into barcodes and filenames, giving Access Document Management more information when filing the document. For example, you could apply set values to specific barcodes so that when filing purchase invoices, the system automatically populates the 'Database Name' field and fills out the 'Purchase Ledger Primary' tag. Again, this option requires the use of the Network Services module.

### File prefixes

This function lets you code documents so that similar documents are automatically stored together. For example, you could tell the system to send all documents with the prefix 'S-INV' to 'Sales and Order Confirmations' folder. This also makes it easy to locate a specific type of document, for example, when looking for all invoices within a list.

### Barcode identifiers

Similarly, adding a prefix to barcodes will ensure that only specified barcodes are read by the system. This is particularly useful when processing third-party documents (such as purchase invoices) where the source file may already contain a number of barcodes. Adding a prefix to the configuration means that only the correct information is picked up, and enables large volumes of documents to be scanned using just one separator sheet. It also eliminates the time-consuming process of redacting irrelevant barcode information prior to scanning.

## Search tools

### Search filters

Powerful search filters make it quick and easy to find the document you want. For example, you can tell Access Document Management to look in specific folders and sub-folders, to search by document type, and to filter documents by tag values such as account code and database name. Once you've found what you're looking for, you can save your search for next time and edit the criteria as required.

### Content search

Access Document Management also provides a Content Search. This enables you to retrieve documents where any specified keyword or phrase is present, and is particularly useful when you don't know the specific document title. Content Search can be used both as a starting point, or to further refine a search based on tag values. You can search any documents supported by Microsoft Indexing Services (e.g. Word, Excel, PowerPoint),

as well as any text documents or PDFs where the file is text-searchable. This includes all documents output from Dimensions – making it very easy to locate, for example, a specific keyword within your supplier invoices.

## Version control

### Check in/out

Access Document Management enables you to track every change made to a document over its lifecycle. For example, users can 'check out' a document, make changes to it, and 'check it in' as a new revision. Each revision can be accompanied by detailed notes. For example, the user could record when they anticipate checking the document back in and each revision can be marked as either 'minor' or 'major' to give the user an indication about the work carried out.

### Version history

On checkout, the document cannot be edited by another user. This ensures that work is not doubled up, and eliminates the risks of multiple copies. Should the person not be able to 'check in' the document for any reason, the administrator has the option to 'undo checkout' at their discretion. Each time a document is checked in/out and comments added, the 'version history' is updated for an instant snapshot of the document's progress.

## Security & audit

### Protection against risk

Digital data provides the safest form of storage. Duplicates are easily made and saved in multiple locations, protecting against disasters such as flood and fire. To protect against internal risks, viewing can be restricted by specified users, groups, or a combination of both.

### Document deletion & recovery

Once users are finished with a document, they can send it to their Inbox recycle bin. It won't be included in any of searches or be visible to other users - but it can be restored to the Inbox if required. Documents deleted from the recycle bin are sent

to the Document Recovery/Purge area of the system. Here, administrators can restore deleted documents in the case of user error or purge them at regular intervals to keep server space at an optimum.

### **Batch control**

For control and visibility over all documents entering your business, those entering the 'watched folder' area can be batched before being released to an individual/group Inbox or committed to the store. While in the batch, designated users can choose to preview the documents, manipulate pages within them (using 'drag and drop') and edit the document tags.

### **Audit trail**

Access Document Management stores a full list of 'transactions' against each document. This means that each time something is created, filed, checked out or deleted, the system creates a secure audit trail, making it easy to track each document at any stage of its lifecycle.

## **Who we are**

Access will give you the advice, tools and clarity you need to make effective decisions, quickly and with certainty. As both a business-focused consultancy and a specialist software developer, we combine our innovative software with practical experience to deliver a solution that's exactly right for you and your business.

You can rely on us to provide you with a solution that's simple, proven and relevant to your company. We have over fifteen years' experience of developing software here in the UK and our regional consultants have tailored and implemented this software all over the UK and Ireland. The expertise we've gained gives us an unbeatable ability to accurately assess your needs and deliver maximum impact with ease and confidence. We believe your solution must be ready for the future, as well as right for today. Because your business will constantly evolve, we provide a software solution that grows with you.

Our modular software covers a complete range of business, financial and administration processes and can be flexed to give you the precise view of your business that you need at any time.

Our supportive consultants combine their first-class software expertise with in-depth industry knowledge to constantly improve and simplify your business processes so that your solution delivers maximum value and a continual return on investment.

With Access, you can be sure you've got the clarity you need to reach your business goals.

### **Further information**

For further information about Document Management or the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**