

Document Management



Attachment Manager

This information sheet introduces the Integra Attachment Manager and describes how it can be used to attach documents and document images to Integra transactions.

Integrated Business Solutions

These facilities allow you to hold document originals at a central location while distributing electronic copies to support transaction authorisation and enquiry activity. In this way, unnecessary paper flow is avoided and bottlenecks in the transaction approval processes can be resolved quickly and effortlessly.

Document Imaging

The Attachment Manager caters for the attachment of documents in a variety of formats. It is used principally however to attach scanned document images relating to various types of Integra transactions such as incoming invoices, statements, purchase orders, etc.

You can scan documents individually as transactions are saved or you can opt to attach bar codes to them and scan them in batches using predefined batch scanning defaults and scanning profiles.

Once the scanned document has been attached to a transaction, it will be available for immediate inspection each time the transaction is subsequently processed or enquired on. It can be retrieved simply by clicking the Attachment Manager button available with all Integra programs.

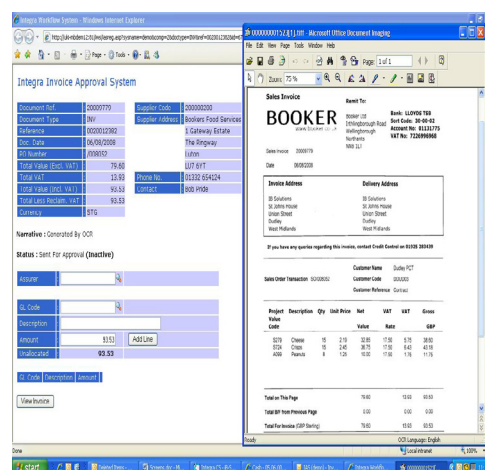
Attachment Manager Parameters

Parameter settings allow you to specify the file types which will be catered for and to nominate the users who will be allowed to access the attachments. Bar coding operations are also controlled by these parameter settings.

The Key Details parameters determine how the Attachment Manager builds up the index key that will be used to link attachments with Integra transactions.

Document Directories

The Document Directories option is used to specify the directories where the Integra Attachments will be stored. A maximum size in MB can be set for each directory as well as the maximum number of files to be allowed in each sub-directory.



Features

- Caters for the attachment of documents in a variety of formats
- Easy to use
- Full integration
- Minimal user intervention



Business Benefits

- Bottlenecks in the transaction approval processes can be resolved quickly and effortlessly
- Delivers significant increases in both performance and security
- Delivers enhanced data storage options
- Unnecessary paper flow is avoided

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Professional Services

iSOFT Business Solutions has an excellent track record of delivering expert support and consulting to Public, Private and Not for Profit Organisations. Ranging from top-down business analysis and enterprise modelling to database design, application implementation and tuning, a comprehensive package of methodologies, support, training and consultancy services has been developed to ensure the success of all projects within a defined framework of quality, cost and time.

Business Strategy

Our consultants can work with you to ensure your business strategy is supported by a complete and deliverable Integra solution.



Technical Support

We offer a full range of technical consultancy and support services to ensure the effective delivery of your Integra solution.



Healthchecks

Our regular healthchecks review the solution architecture and recommend changes or enhancements.



Implementation & Design

We assist clients during all phases of the development life cycle, with teams encouraged to acquire the knowledge to maintain and support the systems.

“Increasingly, organisations are turning to an Enterprise Content Management strategy for managing information and ensuring process and cost improvements. Fundamental to that strategy is powerful technology that automates document and data capture from the point of entry.”

Scanning Documents

The Attachment Manager can be configured to scan each document immediately as each transaction is updated.

In this case, bar codes are not required; the link between the Integra transaction and the document will be established automatically.

This approach assumes that a scanner is available to the PC while the transaction is being updated.

If you wish to scan documents in batches independently of the transaction update process, the Attachment Manager can be configured to produce bar codes automatically during the transaction update.

The bar codes are affixed to the documents, which can then be scanned in batches with the bar code being read automatically to link the document with the transaction.

Various file maintenance programs are available to control the batch scanning process and to configure the document scanner.

The Attachment Manager Drill Across

The standard Drill Across Definition tool is used to control the interaction between the Attachment Manager and the various Integra programs used to update, authorise and enquire on transactions. The Source and Target fields group are used to specify the key details to be passed. Typically, the key will consist of the application mnemonic (RSS, PRL etc.), the company number, the transaction reference and the transaction type.

Other Attachments

You can use the Integra enquiry programs to call up a transaction at will and link it with multiple attachments such as drawings, technical specifications, spreadsheets, memoranda etc. Subsequently, these attachments can be called up instantly for review whenever the transaction is retrieved for authorisation or enquiry purposes.

For more information on Attachment Manager contact:

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