



ST SYNERGY

DOCUMENT CONTROL CENTRE

TECHNICAL WHITE PAPER

Advanced Document Management in an integrated environment

ST Synergy's Document Management philosophy revolves around the concept that document control needs to tie in to real world productivity. Without an intuitive logical filing system, document management can never hope to replace our real world filing cabinet metaphors. Without seamless links that share document repositories with customer and workflow systems, the document management library becomes yet another fragmented enterprise database, working independently of other organisational information systems.

ST Synergy embodies the vision of ground breaking document management via the *Document Control Centre* and this white paper discusses the architecture of the *Document Control Centre* (DCC) and how it brings fresh synergistic information benefits to your organisation.

A new standard in document management demands new standards in information management. ST Synergy delivers this new information volume by:

- Creating new standards in integrated information collection
- Allowing users to work with documents from a *task* centric view – enabling documents to be handled from a document, client, task or workflow perspective.
- Allowing the organisation to define their own filing standards and systems
- Delivering a true paperless office environment

Document Management – the *new* standard

Representing a proven approach to electronic document management, ST Synergy delivers value in a business solution for the enterprise unlike any other in the world today. ST Synergy does this by providing a practical enterprise-wide solution to the management of electronic documents, contacts, job/task flow and marketing information. Eliminating stand-alone systems that ultimately complicate business operations, ST Synergy allows any variety of sales and support teams to manage different aspects of the document/customer/financial interrelationship within a unified information systems solution. ST Synergy also supports links to Internet technologies, enabling the user to be more efficient in engaging new prospects and supporting existing customers.

ST Synergy's document management solution is tightly integrated to our workflow model, with the result that document/customer and task information is highly leveraged throughout the enterprise. With ST Synergy users can track and locate every document within the enterprise as well as obtaining instant on-line access to document related task/job status information. Additionally, the life-cycle of any document can be tracked, viewed and reported on.

By providing this single comprehensive information system, ST Synergy helps multiple departments and teams manage all aspects of the document/task/customer relationship. This in turn ultimately allows organisations to use the document management system to sell, serve and support customers with greater efficiency and productivity.

To function properly, the document management model needs to be centralised and integrated with the customer and financial information system. Organisations also need to track every job/task within the enterprise and this task management needs to work in a seamless manner with all of the above systems.

ST Synergy greatly maximises the efficiency of the Windows desktop-computing environment by automating mail-merge functions and offering seamless integration with other MS Office applications. And by offering database scalability right up to Microsoft SQL Server™, ST Synergy can easily be customised to fit existing & future business practices irrespective of the size of an organisation. Thus with MS Office compatibility and scalability as standard, it is possible to accelerate the deployment of an integrated enterprise document management solution.

Your competitive edge

To remain competitive, organisations require a document management solution that encompasses every aspect of the enterprise information system. Thus this information system needs to deliver the following elements in a cohesive unit:

- document management including:
 - Imaging management
 - hard-copy archive management
- customer relationship management
- vendor relationship management
- workflow/case management
- [time recording, costing and billing](#)

Non-integrated solutions to enterprise document management result in only a partial view of the total situation. Without an integrated solution, it is difficult to obtain a fast and efficient on-line view of all matters affecting the document management task. The need to consult a variety of different databases usually means that an immediate response to an information problem is not possible. The use of such non-integrated technology typically results in:

- Inefficiency in the retrieval/storage of electronic documents.
- The misuse of precedent documents
- A general lack of sustained database marketing due principally to:
 - The unfriendly nature of the databases.
 - The lack of easy to use querying tools.
- A lack of integration between corporate document libraries and other enterprise data repositories - eg customers/workflow.
- Database duplication and tedious data updates.
- An inability to use mainstream applications such as Microsoft Office in an integrated/seamless fashion.

Each and every member of the organisation must be empowered by the information necessary to make your business more competitive. In order for this concept to become a reality, every item of information in relation to the document management process must be visible to your staff from a task centric approach.

ST Synergy's *Document Control Centre* gives your staff and your organisation the ability to work with documents and dramatically enhance productivity.

The ideal solution

Consider the typical information problems in an enterprise:

- You need to catalogue and file every document in your enterprise – including every item of incoming (scanned) and outgoing correspondence as well as customer memos and reports.
- You need to never again reinvent the wheel – the precedent library must be easy to use and maintain so that your organisation's information bank is optimised.
- You need to be confident that your line of business applications (word processors, CAD, spreadsheet software etc) will work transparently with your documents.

Document information management is just the beginning – the Document Control Centre not only integrates information, it also integrates the functionality of your desktop applications.

Imagine being able to see every document ever created for a client – know what was in progress and who is responsible for it, whether a document has been sent or where his work is.

ST Synergy delivers you the roadmap to this complex document management information highway as it allows the organisation's document, accounting, client, and job management systems to be centralised and accessible by all users - thus saving duplication of data.

This total data profile means that users can view/edit all documents relating to a particular customer, attach documents to jobs, track the progress of documents and tasks from a central location. Importantly, all the contacts/customer profile and financial information needed to complete tasks more efficiently is instantly available on-line from this central repository.

With all information relating to the enterprise's documents, customers, contacts and workflow constantly being fed and updated into ST Synergy by any number of users the results are powerful. Any user can add/update and view this information resource concurrently thus creating a collaborative workflow environment.

Imaging of incoming documents is a major concern in today's business environments and ST Synergy offers a centralised imaging control mechanism where staff scan in, categorise and delegate (route) documents arriving from outside the enterprise.

In essence, ST Synergy's seamless integration of document, customer and workflow tools delivers the ideal unified information management solution that is demanded today.

Some specific aspects of the ST Synergy solution

Precedents management

ST Synergy allows the organisation to define the basic precedent documents. These documents can be almost any electronic file type – including TIF scanned images, Microsoft Office documents (Word, Excel etc), PDFs, CAD documents etc.

Filing functionality

ST Synergy automatically files documents at a document server location for you, taking care of naming, and sharing the file amongst everyone in the company. Naturally appropriate security restrictions allow you to define who can see the contents of sensitive documents.

Once stored, ST Synergy allows you to simply click on a document title and launch the document with the software taking care of knowing where to retrieve the file and even which host application is required to launch it. With ST Synergy you work with documents on a logical level, leaving the software to take care of electronic filing and launching.

Incoming mail

ST Synergy allows you to automatically import scanned documents – either individually or in bulk – and these documents can be routed to users for their attention, logically filed and cross referenced to particular clients.

From the documents tab of the *Client Control Centre*, not only do you see documents that have been created for the client – you can also see and quickly preview all incoming mail or other scanned documents. ST Synergy supports the popular file formats for scanned documents including TIFF, PDF, JPG & BMP – allowing quick integration with your scanning hardware leading to a true paperless office solution.

Document Workflow

ST Synergy allows users to track and view the various stages of a document, from its creation, editing ('work-in-process' state) through to its finalisation.

Today's business requirements demand that organisations be able to track, view and report on the various stages of the document in its progress through the system. Documents that are related to clients need to be attached to the client record and be viewable from the Client Control Centre.

Accordingly, using ST Synergy, users can discover which documents are in progress at any given time, which have been dispatched and if so when, as well as being able to track and view documents that are for internal use only (ie not for dispatch outside of the organisation).

Importantly, the above analysis may be made from a client, job, user or document perspective. This means that enterprises can track the status and life cycle of a document as it related to a customer or a job. Users via the 'Work Centre' have a view of documents that are in progress by them as well as those which have been delegated to them - the work centre also allows supervisors to view and track the status of delegated documents/jobs.

Due to the fact that a document can also be attached to a job, users can track both document and task life-cycles. Importantly, users have the ability to report on an enterprise level in respect of both jobs and documents in progress.

Document Server Locations

Scalability in terms of the document server is afforded by ST Synergy's ability to change the document server location as necessary. This ensures that administrators can reassign the current document server location thus maintaining the document server at optimum efficiency.

Tracking outgoing documents

The flow of documents in and out of the office is assisted by a mail register system which is tightly integrated with the document workflow model. ST Synergy allows organisations to keep a history of all documents that had been mailed to clients in terms of what was mailed, and when. In addition, the very act of mailing a document would indicate that the life-cycle of a document meant for external dispatch is complete (ie it is in a dispatched state).

To assist and simplify the recording of mailed documents where companies employ a mailing clerk, ST Synergy makes visible a unique identifier to desktop applications, and this identifier may be printed on a completed document as a reference number before being given to the mailing clerk. The mailing clerk simply keys in this unique identifier(reference number) into the ST Synergy mailing register system to indicate that the document in question is being mailed. This in turn 'dispatches' the document (if the creator of the document had not already done so). This meets the enterprise's need of knowing not only what was sent and where, but maintains the workflow history of the document.

As an added benefit, ST Synergy automatically produces a label run that aids the mail room in completing the document mailing process.

Marketing issues

ST Synergy also tracks the history of document mail-outs to clients, these general mail-outs are in the nature of promotional letters (eg newsletters) - using ST Synergy, users can track, view and report on exactly what has been sent, and when.

Another extension of the mail-merge functionality of the application is the ability to allow users to gather a bulk list of clients in an ad-hoc fashion based on point and click selection criteria from various aspects of the customer information system including profiles etc. Accordingly, a user can then save this criteria in the form of a query for future use in bulk mail-merges. Once a list of clients is created the user can proceed with merging the data, selecting a master merge document from the master document repository.

Support for host applications and OLE

In order to provide seamless integration with MS Office applications, ST Synergy extensively employs OLE interoperability with Word, Excel and similar OLE enabled applications. The design brief for this interoperability was to automate the day to day tasks that users would employ as much as possible. Thus users can create, edit and mail-merge documents without having to know how to file documents, where to find them or even how to perform mail-merge operations using Word. ST Synergy's use of OLE and open database architecture support effectively shields the user from every complexity.

Non-OLE applications are supported via command line parameters. Accordingly, any application that accepts a command line parameter may be registered with ST Synergy including multi-media viewers, CAD software, GIF/TIFF viewers, HTML editors etc. This allows ST Synergy to present the user with a rich set of supported application types to enable almost any document managing task to be handled with ease. So once registered, ST Synergy takes care of launching the application with the appropriate file as necessary.

Thus, all manner of electronic media may be stored and recorded at the *Document Control Centre* and within the documents library. Users may use this feature to log bitmaps of client logos, site maps and other client related files within the system. Accordingly, a user can operate on client related issues on a logical level without having to worry about document or application types.

Integration of such Line-of-Business applications with ST Synergy means that a user can, with a few mouse clicks, design a complex query that interrogates the documents, contacts, accounting and workflow data stores and arrive at a client result set that can be automatically mail-merged with a chosen document template. This illustrates the ability of ST Synergy to cross traditional organisational data boundaries and integrate customer/workflow management, and electronic data repositories with desktop applications to maximise efficiency and in turn optimise an enterprises return on investment.

Summary

The ST Synergy document management model delivers a unique solution that bridges desktop applications and document, workflow and customer management to deliver leading edge technology vital to managing today's electronic document management issues.

The table below outlines a cross section of the ST Synergy *Document Control Centre* – with major applications and tabs defined for ease of reference.

| Component | Use | Typical application |
|-------------------------------------|---|---|
| Enquiry | Presents an extensive set of search parameters that allows users to search for documents using almost any search criteria – including document title, filing category, date created/edited, related client(s), keywords, author (or any combination of these) | Locating existing documents/Searching precedent libraries |
| Master Document library | Allows administrators to define any number of master(template) documents within the enterprise “precedents” library; underpinned by a two-tier filing category structure. | Precedent management |
| Application types | OLE interoperability with industry standard OLE enabled applications (Word/Excel etc) and integration with other Line-of-Business applications (CAD software etc) | Integration with desktop applications |
| Preview | Enables users to quickly preview files (including scanned TIFF images). | Productivity enhancements |
| Finalisation/Dispatch | Enables a life-cycle view for document management | Workflow and task aspects of document management |
| Mail-outs | Allows the user to define a range of clients that need to be targeted for a specific document/newsletter etc and automatically mail-merge a document to those clients | Marketing/Promotional activities |
| Intranet | Built in support for HTML files, including a ready built intranet to get organisations onto the HTML on-ramp immediately | Quality Assurance(QA)/Procedures management etc |
| Task attachment | Attach documents to jobs via Tasks tab, and then route documents throughout the enterprise using delegations. | Case management. Document distribution |
| Mail register | Trace all outgoing items of correspondence from your enterprise – track documents from the legal, quality assurance and marketing perspective | QA/legal requirements for tracing outgoing mail. |
| Postmaster | Support for bulk importing or scanning and routing of incoming documents to appropriate users for action. | Paperless office management. Document distribution, |
| Guideline attachment | Attach documents to master jobs via Guidelines tab | Task/Job management: documentation, procedures |
| Proformas attachment | Attach master documents to tasks on master jobs via Proformas tab | Integrated task/document mgmt. Document creation productivity |
| Create Workflow (aka Scanning Form) | Advanced scanning and importation of documents that triggers the creation of Workflow | Paperless office management. Integrated document/job mgmt. |

Table. Main Cross section of ST Synergy Document Control Centre