

Document management

JEEVES ENTERPRISE

The Organic Business System



An efficient document management system reduces the time it takes to find documents, and also guarantees that the correct version displays. It simplifies distribution and ensures that documents are only accessible for authorized recipients or senders. As a rule, documents are carriers of business critical information - they should be easily accessible but still quality assured and authenticated when they are needed.

Jeeves EDM, (Electronic Document Management), fulfils the fundamental requirements that should be imposed for a document management system with good control of all types of documents. Through integration with the Jeeves Enterprise business system, documents can be linked to projects, customers, items, service cases and work flows, etc. Jeeves EDM is therefore a unique tool for increasing the efficiency of business processes, supporting case management and improving the spread of information in a company.

Document access

Simplicity and usability are key words for Jeeves document management. Every document, exactly like other data in the business system, should be stored in one place. The documents can easily be found and shared by several people. They can be locked for changes but at the same time can be read by everyone else who has rights to read them. Naturally, it is then possible to go back and see who has read or updated the document. Simple and basic functions which are self-evident for the person working with information management.

Document types

Jeeves EDM only stores one file pointer in the database while the documents are physically stored on a file server. There is therefore no limitation for which documents can be handled. There is standard integration with Microsoft Word and Microsoft

Outlook. Using Jeeves' powerful macro languages you can also create your own links to applications that support VBA, e.g. Excel, PowerPoint and AutoCad. A document type is specified for every document that is registered in Jeeves EDM which defines both the document's logical type (e.g. change request) and determines its physical properties (e.g. which program will be used to open documents of a specified type).

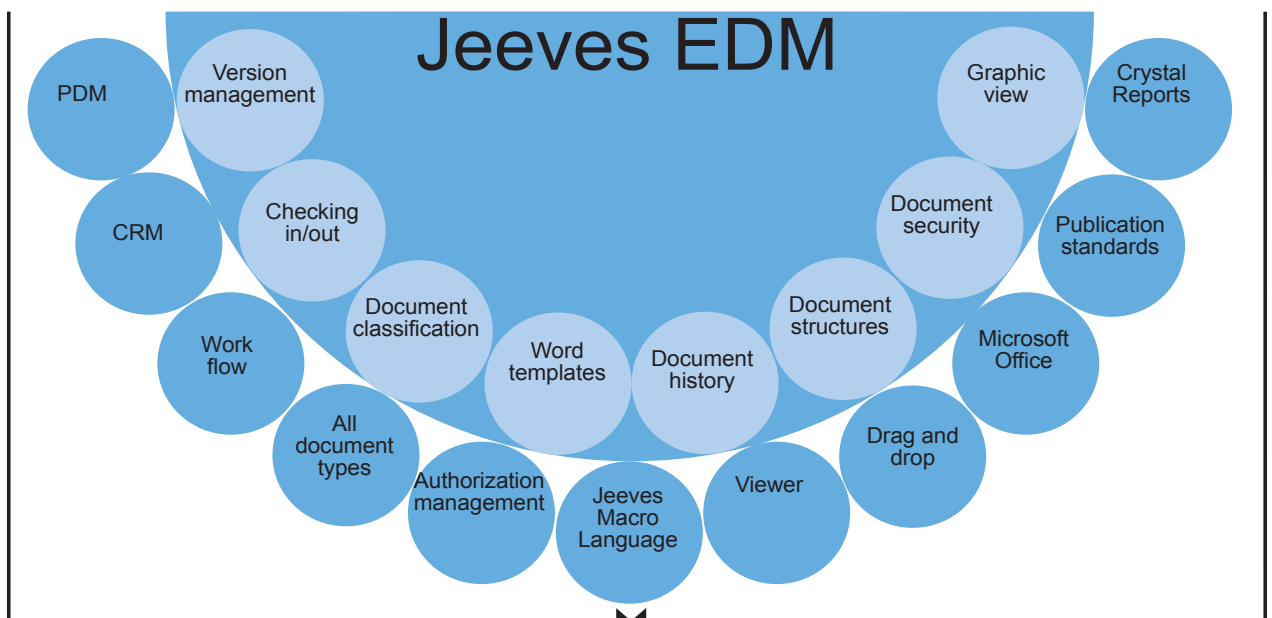
Integrity and security

The document type also sets restrictions for who can view which documents. Authorization can be determined both for groups and for individual users.

The file server where the documents are stored is not accessible via the network. Only a person with full rights to the server has direct access to the files. Therefore a normal user can only access the documents via Jeeves EDM. Document access can thus be fully controlled via Jeeves' authorization system which controls which login signatures can see which documents.

A unique ID under which the document is saved is generated for every new document. In this way the documents' uniqueness is controlled, and that documents can only be identified via Jeeves EDM. When a document will be opened, it is copied across to the Jeeves client. This is done in the same way over the local network as over the Internet. Using Jeeves' thin client you always have access to all centrally stored documents, regardless of where you are in the world.

To edit a document it must be checked out in Jeeves EDM. A local copy for editing is created. Until the document is checked in again it is blocked for changes for everyone except the check-out signature.



However, it can be read and can then only be opened via Jeeves EDM. All change and access history is saved. In this way a document issuer can see in a log screen who has studied a document.

Record entry

Documents are recorded simply using drag and drop, i.e. the file in question is dragged from the file manager and dropped into a Jeeves form. Meta data, such as title, author, project, etc., is then specified. Using Jeeves' macro language the user can define which fields must be filled in, which guarantees that all necessary information is specified. The document can then be left in its local position but should be copied to the central file server, which can be done simply by pressing a key.

You can also create new documents from Jeeves EDM. By specifying a certain document type and pressing a key, an empty document opens in the application that the type is linked to. If a format template is specified for the document type, the new document is created as an instance of this.

Version management

To keep track of changes and who made these, Jeeves EDM includes both revision and version management. The user defines indexing and a validity period. The revision number can be set to change automatically on every update occasion. The version number is then increased manually if a major change is made to the document content. The logic that manages the version number allocation is flexible and can support even advanced version management, with document owner /issuer, who is working with 'living' documents that are constantly updated and edited in parallel by several employees in different roles and functions.

A log then shows how a document has developed over time for a revision or version change and who did it. When all previous versions of a document are saved, information about an old document can be produced which is sent, for example, to a customer at a specific time. Normally, however, the latest relevant version always displays.

Word templates

Jeeves EDM includes easy to manage functionality for creating reusable templates in Word which can be filled with data from any program in Jeeves Enterprise. The function is excellent for e.g. mass mailings, lists or tables.

It is easy to create templates using a couple of Jeeves buttons which are entered in a global Word template. Where data from Jeeves is required in a document, you press a button in the Word menu and a bookmark is entered with a reference to a field in Jeeves Enterprise.

E-mail

Sent and received mail can also be saved in the central file server through a link to Outlook. The mail is saved in a text file and appendices are saved in their existing format. Therefore you do not need access to the mail server to view the mail again. It is very important that this information can be made accessible to others with regard to how much exchange of information is performed using mail.

Integration with Jeeves Enterprise and Workflow

Jeeves EDM is fully integrated with the Jeeves Enterprise business system. A document can always

be traced back to the business event and/or the object from which it originates. A document search can be performed using common parameters from all modules and programs in the business system. If, for example, you are on a customer record, a search is performed on all documents linked to the customer.

From a CRM perspective, a sent document can, for example, be reported as an event on a customer record and thereby made visible to others who have contact with the customer.

Document management is an important element in most business processes. Documents should be attested, confirmed, verified, consulted, checked, signed, authorized, etc. Using Jeeves Workflow, case management can be automated and secured so that everyone who needs to study a document also does this.

Document structures

Jeeves EDM also handles multiple documents, i.e. a document structure with a document that consists of several other documents. The documents' relationship in a structure is shown in the form of Included in and Consists of lists. To achieve a clear overview of complex structures, these can be displayed graphically in the form of a hierarchical tree structure.

By defining a folder structure, the graphical view can be used to organize all documents and then logically trace the ones you are looking for. The function can also be used to link appendices to a main document.

PDM

PDM stands for Product Data Management and refers to management of production related documents. Processes for e.g. manufacturing, service and quotation/order are often managed through different types of specification documents. A document structure consisting of several documents linked to different items can automatically be converted into an item structure which can be retrieved by Jeeves MPS and Order modules. There is support for managing drawings and extensive technical documents. Using Jeeves Macro Language you can link e.g. items to components in AutoCad.

Digital publication

Web-based communication is based on offering an easy-to-navigate document structure where visitors can use links between different documents. A website consists of separate document types (html/css, xml/xsl, asp/Java script, gif/jpg, vml/svg etc). They are often versions or converted copies of other document types.

Quality and administrative gains can be achieved through integrating the digital publication on the Internet with general document management with the support of Jeeves EDM. In this way you ensure that the same requirements for authentication, verification and authorization are maintained in this distribution channel as well.

Jeeves' flexible interfaces allow you to add your own fields which allows you to categorize and index the documents according to company specific or industry specific standards for classification of meta data.