



**Do you want to reduce costs?  
Do you want to increase efficiency?  
Do you need FICA compliance?**

**DocMan and DocPOD will ensure that you do!**

**DocMan is a Document Management program designed to import any type of document and serve it back to you when you need it. You set up your own Indexing and storage structure and DocMan takes care of the rest.**

**DocPOD is a system designed specifically to control your Proof Of Delivery documents. It can tell you which PODs are still outstanding and can immediately find any POD by its number or the Customer. It is designed to be used by companies with branches countrywide.**



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## **Document Management in the business**

It is normally acknowledged that there are four levels of document management. These levels are:-

### **Level 1. Data Backup Systems**

Data backup systems are used to safeguard the availability of information in the case of emergency or the need to fulfil legal requirements. They are characterised by little or no indexing and the data is seldom retrieved.

### **Level 2. Archiving Systems**

Archiving systems are used to store documents and information required in the long term with individual access facilities at potentially every area in the workplace. They are characterised by the fact that information is seldom updated or changed with the desire to access information diminishing over time.

### **Level 3. Search and Retrieval Systems**

Search and retrieval systems are used for managing and providing knowledge-based information. They are characterised by complex indexing, no reduction in the need to access over time with frequent additions. Access must be freely available in the workplace

### **Level 4. Document Management Systems (DMS)**

DMS are used for the capture, maintenance and viewing of documents with or without history. Document management systems include the first three system hierarchies. They are characterised by the ability to capture, allocate indexing rights, the ability to route and record a history of the document over its lifetime.

**DocMan Document Management can function as any, or all, of the above operations.**



## **DocMan's Design Philosophy**

Document Management can be divided into 4 broad categories within which various operations can take place.

These categories are:

**Capture  
Management  
Retrieval  
Dissemination**

Not one of the categories is more important than another. It is no use managing documents which you can't find, neither is it any use capturing documents that you can't manage properly.

What is required is a synergy in which all (or as much as is practical) information is captured. This information must be stored in a way that is easy to understand. Retrieval must be simple and available to many locations. Once it is retrieved it must be distributable using standard procedures (i.e. print, fax email, CD-ROM and web browser).



## Category 1. Capture

This encompasses the various methods necessary to get the information into the Management system. There are two main capture functions within our software.

Scanning - Scanning encompasses the ability to capture multi-page documents as one file, to compress the file, and store it on hard drive.

Linking - Linking is the ability to search the network for a file and to then draw a copy of that file into the system

Scanning and linking can be further divided into **Index Capture** and **Direct Capture**

**Index capture** means that whoever is scanning or linking documents indexes the document at the time of capture. This presupposes that the person capturing the document knows into which Filing Cabinet and Folder the document should be stored as well as possessing the knowledge to describe the document accurately and choose additional keywords with which the document can be retrieved.

**Direct capture** means that whoever scans or links the document only does that. The document is automatically routed to an **Incoming Mail** file where people with the knowledge are able to view and then index the document as necessary. This feature also allows the document to be sent to another person for them to index thereby allowing distributed indexing. Another benefit of this system is that the scanner is used much more efficiently scanning up to 3 times as many documents compared to when documents are indexed at the time of capture.

The system automatically creates an **Automail** file. Any document saved or copied to this directory is drawn into the Incoming Mail file and can then be indexed in the same way as a document brought in via direct capture.

DocMan has also been interfaced with **various Fax systems allowing incoming faxes to be copied to any specified Automail indexing folder.**



## **Category 2. Document Management**

What can we do with, or to, the document whilst it is stored in the Management system.

This encompasses the ability to find a document and change the Folder, document description, document type and keywords for that document. The image itself can be re-scanned and added to, the pages within the document can be moved and rotated. Users with management rights can add Filing Cabinets, Folders, Document Types, Indexing Stations, Document routing and various other options. The ability exists to merge multiple tif format documents into one document and the ability to split multi-page tif documents into separate documents. A totally separate structure can be set up to store archived records and completed Folders can be transferred to the archive facility.

Routing - Any document once received can be routed to a person or department on the routing list. This will store the date and time of the routing. The recipient can then access the routing system and view any document routed to him. The recipient has the ability to route the document to someone else and at the same time attaching a message to the document. The document can be routed like this back and forth. Each recipient can add a message and re-route. Each routing has the date and time attached and the history can be accessed from any of the View functions described below.



### **Category 3. Retrieval**

How can we find a document or group of documents that we need?

Any document can be found by any, or a combination of, the following view options.

#### **By Filing Cabinet**

Filing Cabinets are listed alphabetically. As each Filing Cabinet is highlighted the Folders stored within the Cabinet are displayed. Clicking on a Folder displays the documents within the Folder and clicking a document displays the document itself.

#### **By Folder**

Each Folder within the system is displayed alphabetically with its Filing Cabinet listed next to it. If a document is in a Folder but you are not sure which Filing Cabinet it is in this option will find it. Clicking on a Folder will display the documents within the Folder and clicking a document display the document itself.

#### **By Document Type**

Document types are allocated by you. They can be descriptions such as CONTRACT, INVOICE CLAIM etc. or GAUTENG, KWAZULU-NATAL etc. Any document of a type is displayed and clicking the document displays the document itself.

#### **By Document Description**

This displays all of the documents within the system alphabetically. Clicking the document displays the document itself.

#### **By Keyword**

Any word allocated as a keyword when the document was captured is linked to the document. Irrespective of the documents location the keyword will find the document and any others using the same keyword.

Clicking the Document Description displays the document itself.



#### **Category 4. Dissemination**

Once we have the document what can we do to give it wider coverage?

Once the document is viewed the following options are available depending on the hardware installed.

Print the document or a range of pages

Fax the document (if an internal computer fax system is installed.)

Email the document if Windows Messaging is installing)

A further feature is the ability to create a CD complete with document viewer. You choose any Folders that you want to put on a CD, display the documents within the selected Folders. Mark any documents that you do not want to put onto the CD. This will create a directory on the system and copy into the directory all documents with their specific associated search files and the Document Viewer.

Once the job is complete the directory can be copied to CD using any writeable CD system.

The above is an overview of DocMan but additional features are being added all the time. We rely on our customers to tell us of any improvement to the system that they regard as significant.

We assure you we listen very carefully.

