Out-of-the-box Integration

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Introduction

The purpose of this paper is to discuss how it is possible for small and medium-sized firms (SMB's) to achieve levels of application integration historically reserved for large enterprises with deep IT pockets. Specifically, how an Electronic Document Management System (EDMS) can be integrated with other core business applications to drive efficiency and manage IT costs.

One of the bigger problems small enterprises face is the need to enter the same data more than once to satisfy the requirements of different software applications such as a customer relationship management system (CRM) or an accounting software package. Frequently these applications do not communicate data with each other. As a result, data is entered twice, increasing possibility of data entry error. Another significant problem is learning new software applications. Most small enterprises find it difficult to spare employee time to learn new software applications.. CNG has developed two modules, Synchronizer and Retriever, which address both of these problems and provide the advantages of using an EDMS. In addition, Synchronizer and Retriever reduce the amount of time necessary to integrate software applications from weeks to less than a day. By solving these three problems, Synchronizer and Retriever make the investment in a document management solution easy to justify versus deploying a non-integrated document management solution.

What is an EDMS?

Simply put, an EDMS is a system that can replace not only the paper files and documents in an office, but enable users to send electronic documents through the same steps a paper document or file would follow. For example, if a financial services firm has a new account form completed for each client account and it must be routed from the agent to the trader and then to accounting, then a document management system must provide the same path. So, a true document management system not only provides storage, but must provide the same workflow capabilities. Along the way it must also protect documents so only the necessary people can view them. An example might be a medical clinic which must comply with HIPAA regulations. Patient records must be kept confidential and an audit trail kept for all record access. An EDMS is a step up from point solutions like spreadsheets and word processors as the entire office must be capable of using them; therefore, they must be easy and straightforward to use and ideally would integrate with other applications in the office with a minimum of effort. More information about document management systems and the benefits they provide can be found here.

What is NED2?

NED2 is an acronym for Never Enter Data Twice. For instance, the contact management software used by the sales department requires prospect and customer data to be entered before being used. Once a sale is made, if the data from the contact manager cannot be sent directly to the accounting system, the data will have to be reentered in the accounting system. This results in inefficiency and the possibility of data entry error. Additional software systems brought in to help the business could compound the problem by requiring the same data to be entered over and over.

How does Synchronizer provide NED2 capability?

Synchronizer is an add-on module for the CNG-SAFE EDMS. CNG-SAFE is based on a cabinet/folder model. For instance, each vendor in the accounting system would have a folder in the vendor cabinet in CNG-SAFE. In order to maximize the efficiency of the software, Synchronizer is used to automatically read the data from the accounting system and create a folder for each vendor in the vendor cabinet. The same thing could be accomplished with almost any software package. Synchronizer can connect to almost any ODBC (Open Database Connectivity) or OLEDB-compliant (Object Linking and Embedding, Database) database. It can be configured to read data from this database and automatically create folders based on the data. This defeats the problem associated with entering data more than once and ensures the data is the same in both systems.

Synchronizer can be set up to run automatically so that users simply enter data in the existing software application and folders are automatically created in the EDMS. This eliminates the need to enter data twice and ensures the data shared by the systems is always identical. If changes are made in the originating application, these changes will be reflected in the CNG-SAFE data.

It is important to note most businesses have one application which they consider to be the master program which contains vital customer, prospect, or employee data. And it is important that the “master” database is only edited by user in that application. Synchronizer is set so that changes made in the “master” database will be written to the CNG-SAFE database, but if a user makes changes in the CNG-SAFE database; those edits will not be made to the “master” data. This makes it possible to control and manage the “master” database so that this data is always the most accurate. When you deploy an EDMS you should make sure you know where your “master” data resides.

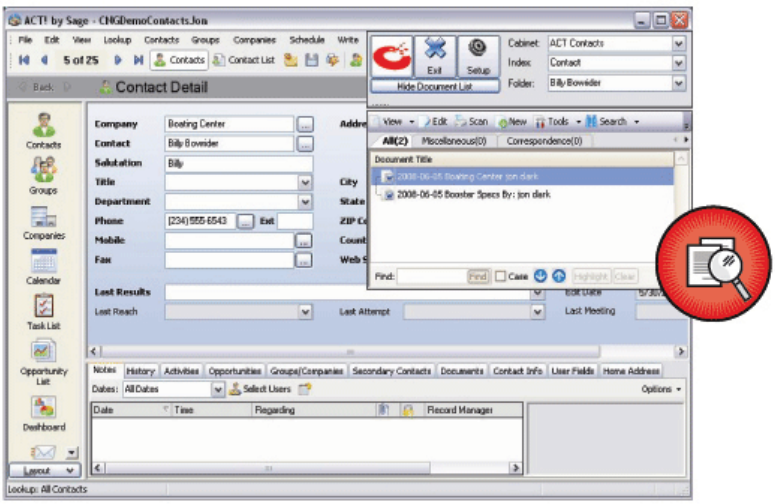
Training for new software systems

One of the issues small enterprises face is the need to train personnel on new software applications. This can be a time-consuming process for companies that cannot afford employees to take large blocks of time from their main tasks. In an effort to minimize the amount of training necessary to operate the CNG-SAFE EDMS, CNG has developed the Retriever application. This application reduces the time necessary to learn how to use an EDMS to minutes for the personnel who are casual users and only need to use the EDMS to occasionally look up documents.

How does Retriever minimize the training time issue?

Retriever is a Windows-based application that connects CNG-SAFE with other Windows-based software applications. If the sales department uses a contact management software or CRM software package, Retriever can be connected to these applications and provide a way to look up documents based on the information being displayed in the application. An example is the ACT! Contact management system. Retriever is connected to a field on the contact screen that provides enough information to look up the folder for that contact. A list of all documents for that contact can then be displayed. It literally takes less than five minutes to understand how Retriever works and use it. The user does not have to have the CNG-SAFE application open and does not have to learn another software interface. They simply click the Retriever icon when they wish to see the documents for the contact being shown on the ACT! screen. A list of applications that Retriever is known to work with is maintained on our website at http://www.cabinetng.com/products/retriever.php. Retriever can work with virtually any application developed with standard Windows development tools.

Retriever enforces security and controls access to documents based on user rights defined in the CNG-SAFE management module. The screen shot below shows Retriever connected to ACT! with the document list open. When minimized the Retriever icon simply floats on top of the connected application and keeps track of the current information on the screen.



Conclusion

The Synchronizer and Retriever modules allow businesses to integrate with other software packages without having special software written. This integration with other applications used to take custom programming time and might take months to complete depending on the complexity of the integration being completed. These two modules simplify the integration process and reduce the time and cost necessary to implement a total solution. By making the integration a point and click interface, Synchronizer and Retriever have made it very simple to integrate software applications with a document management solution. This reduces the cost necessary to implement an EDMS by reducing training time, implementation costs, and avoiding unnecessary data duplication.