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CASE STUDY

Document Register

1 OVERVIEW

"We conducted a comprehensive analysis to evaluate the feasibility of integrating a Document Register into the existing system."

2 OBJECTIVES

- ❖ Establish a direct link between the File Storage and the Order Goods ERP System.
- ❖ Associate existing files and folders with specific orders defined within the ERP System.
- ❖ Facilitate direct access to associated files and folders from individual orders.
- ❖ Ensure the process delivers a straightforward and user-friendly solution for all users.

Case Study Reference: RIS-Q-024-001

3 SOLUTION

- ❖ Carryout requirements gathering on existing 'Order Goods' System and map to File-Storage.
- ❖ Map new SQL Architecture to accommodate association to individual 'Orders'.
- ❖ Provide Client with options and Delivery Road map.
- ❖ Modification of existing 'Order Goods' ERP System.

4 IMPLEMENTATION

1. Modification of the existing SQL database to enhance functionality.
2. Updates to the ordering process, including the addition of a Document Register tab to display linked files.
3. Revisions to customer records to direct them to source folders for Quotations, Drawings, Powershape Models, Job Cards, and Purchase Orders.
4. Enabled the ability to add new entries and modify or delete existing entries.
5. Conducted User Acceptance Testing prior to rollout.

5 RESULTS

The client can now associate files as per the approved requirements. Furthermore, they are exploring additional scopes of work related to this functionality.

The client's system was successfully updated within a six-week timeframe from analysis to delivery.

6 CONCLUSION / TESTIMONIAL

"The client expressed satisfaction with the additional functionality, highlighting its user-friendly nature and its effectiveness in reducing errors associated with file assignment. This enhancement has significantly streamlined their operations."

7 CONTACT INFORMATION

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