VAI AND HELPSYSTEMS INTEGRATE ERP AND DOCUMENT MANAGEMENT

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The paper chase continues. File cabinets stuffed like sausages. Purchase orders, invoices, adjustments, and correspondence in an archive and retrieval system that's been used since the horse and buggy days. Electronic document management has yet to arrive at a surprising number of midsize businesses.

Data management begins here at the intersection of modern ERP and digital business processing. "Companies in every industry are looking for ways to streamline business processes," says Joe Scioscia, vice president of sales at VAI, an ERP software company that has added a document management component via a partnership with HelpSystems. Workflow efficiencies are a popular and profitable goal for VAI customers and ROI is not hard to determine.

The document management and workflow capabilities were added because they provide customers with a paperless archive of documents that is easily organized, conveniently searchable and secure, Scioscia said.

The system includes automated process and workflow management, document scanning, digital storage, data forms management and document creation; however, only the accounts payable piece is currently being integrated with VAI's S2K enterprise resource management suite. The additional system features will be rolled out in phases.

"The payables integration is first, and we are prioritizing the next phases, such as accounts receivable, order processing, and vendor and inventory transactional documents. says Kevin Beasley, VAI's chief information officer. "It will all eventually be available through a Web interface for our vendors and customers and will take months to finish the initial integration. We are slated to complete the total integration in 2017."

HelpSystems has been investing in document management software since its acquisition of RJS Software in late 2014, according to the company's Chief Executive Officer Chris Heim. Those investments include bringing RJS into the HelpSystems' development, expanding RJS' development resources, and making the product more open by creating RESTful APIs that allow integration to other software systems.

Within a month, HelpSystems will announce a Web-based graphical user interface for its document management software, which will eliminate the thick client on a PC and allow users to view documents in a mobile environment as well as a desktop browser.

HelpSystems, which has been on an IBM i ISV buying binge, has a development goal of integrating,

at least to some extent, all the key products in the HelpSystems portfolio.

"This was an important development in terms of partnerships and with integration with other HelpSystems products. And, it's what our customers wanted," Heim says.

The open architecture was a key factor for the VAI partnership and the ease of integration for VAI customers with document management.

Beasley estimates between 15 percent and 20 percent of VAI's customers currently have digital document management capabilities.

HelpSystems' Howard Latham, general manager of document management, says integration with other HelpSystems products is under way.

"You will see document management integration with our security systems in the coming year," he says. The security side of regulatory compliance requires documentation that is better handled by digital documents than paper documents.

"When you are in the paper world, you are literally in that black file cabinet with one person able to access a document at a time. Electronic document management provides secure access to whoever needs to access a

document and you know when it takes place because it's time stamped," Latham says.

Along with document management, companies need to think about secure access, storage, and backup and recovery. DR and HA solve problems, but they also require some forethought and planning with regard to integration with ERP and document management systems.

Hein says the HelpSystems value proposition is document management for midmarket companies. This is not a six-figure outlay like the large enterprise make.