

## Electronic Document Management System using DocuVision for Food Reserve Agency

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### Abstract

This project entitled Food Reserve Agency (FRA) Document Automation system is a server-based application that client computers accesses in order to manage documents.

The server provides a facility for client computers to manipulate the internal documents that various departmental users make use of such letter, reports, photographs, images, etc.

A document management system (DMS) is a system (based on computer programs in the case of the management of digital documents) used to track, manage and store documents and reduce paper. Most of these DMS are capable of keeping a record of the various versions created and modified by different users (history tracking). The term has some overlap with the concepts of content management systems. It is often viewed as a component of enterprise content management (ECM) systems and related to digital asset management, document imaging, workflow systems and records management systems.

In the case of our project, we procured a DMS from our Enterprise Resource Planning (ERP) company called Netone IT Ltd. The DMS is called the DocuVision.

It has the capabilities to create folders and various file types with varying attributes. This made our project easy and very reliable in terms of the solution provided to users. This was particularly very handy for our Registry department which receives and stores hard copy documents.

### Keywords

1. Electronic Document Management System (EDMS)
2. Server based application
3. Client computers
4. document management system (DMS)
5. computer programs
6. digital documents
7. content management systems
8. Enterprise Resource Planning
9. enterprise content management
10. folders
11. secure storage
12. naming standards
13. document ownership
14. document revision control
15. inactive files

### Introduction

In our organization, the Food Reserve Agency (FRA), all our departments have documents which we desire to store in a system that can help us to among other things:

- Store the documents in a secure storage
- Classify the documents based on different attributes
- Find your documents with only couple of mouse clicks
- Set authorization rules
- Link the document to different objects
- Check-In and Check-Out a document
- Create different versions and revisions of a document
- Record change history of a document etc.

Electronic Document Management System (EDMS) is a system that allows user departments to manage documents electronically. The idea is that manual documents are converted into an electronic form using devices such as scanners. The starting point is to create folders for each type of files. In our situation, each department has a folder

There are a number of document management software available including but not limited to:

- DocuVision
- Zoho Docs
- Logical Doc
- Microsoft SharePoint Online
- M-Files DMS
- Ascensio System Only Office
- Evernote Business
- Etc

We went for DocuVision because it is cheap and easy to implement. This application has ease to use screens as will be seen later. The application can run on nearly any basic computer as a client.

### **Problem statement**

FRA is a Government owned institution which was established under the 1995 Act Cap 225 of the laws of Zambia.

It has three mandates or key functions namely:

- Ensuring there is a strategic food reserve
- Proving market access to the small-scale farmers
- Providing market information

FRA deals with a lot of information which is mainly manual in nature. The documents are received and stored in the Registry. The documents are of various types and from different sources in different formats.

The Registry is made up of a building which is about 15meters by 45meters and 4 meters high. This is our center of documents both active and inactive files. The building is divided in two parts namely; the Registry for active files and the archive for dormant files.

The biggest issues in managing the documents are outlined below:

- Loss of documents
- Lack of naming standards of the documents
- Difficult to separate and classify documents
- Difficult to locate where a particular document is stored
- Difficult to trace document movements
- Compromised security and compliance
- Lack of document revision control
- Lack of document ownership etc.

There have been difficulties in handling documents with regards to the above areas. When documents are being manually managed, the above challenges are really difficult to manage and this calls for an automation of the process.

### **Approach / solution provided**

As a result of the challenges mentioned above, we started looking out for a practical but affordable solution on the market. We came to know of a product called DocuVision software. This has an easy integration feature with Sage 300 ERP software which we are using.

The DocuVision was installed on a server and licensed users logon to access the folders that they been given access to only. The rest of the folders cannot be seen where the user has no access.

The biggest challenge during this process was the scanning of documents to convert them into electronic and assign them to corresponding user departments.

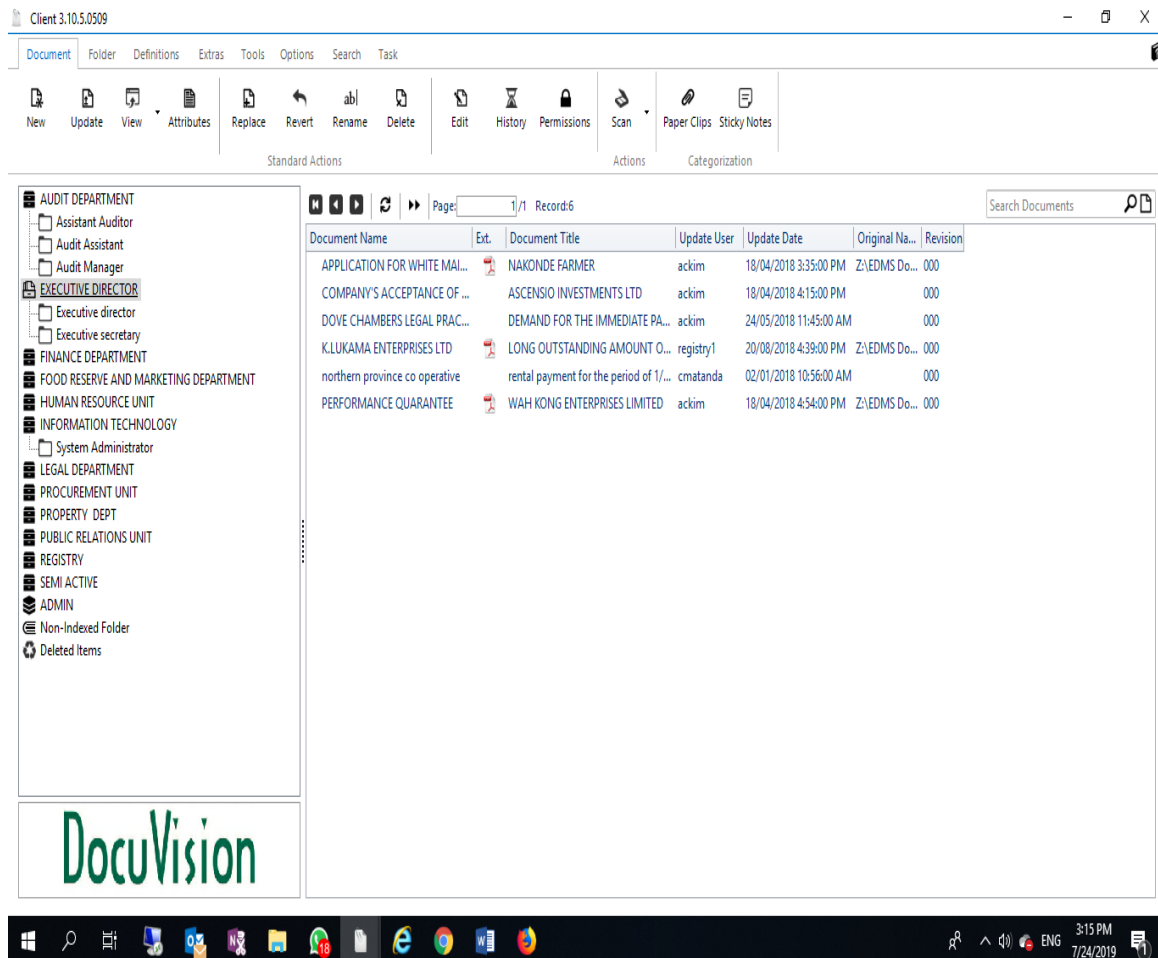
Each manual document or file is scanned and posted into a folder depending on where its ownership. Each folder belongs to a department and each has sub-folders which ends up drilling down to individual users.

For this project the following folders were created:

- Audit Department

- Executive Director
- Finance Department
- Food Reserve and Marketing Department
- Human Resource Unit
- Information Technology
- Legal Department
- Procurement Unit
- Property Department
- Public Relations Unit
- Registry

This can be seen in the diagram below which is a snapshot from the system.



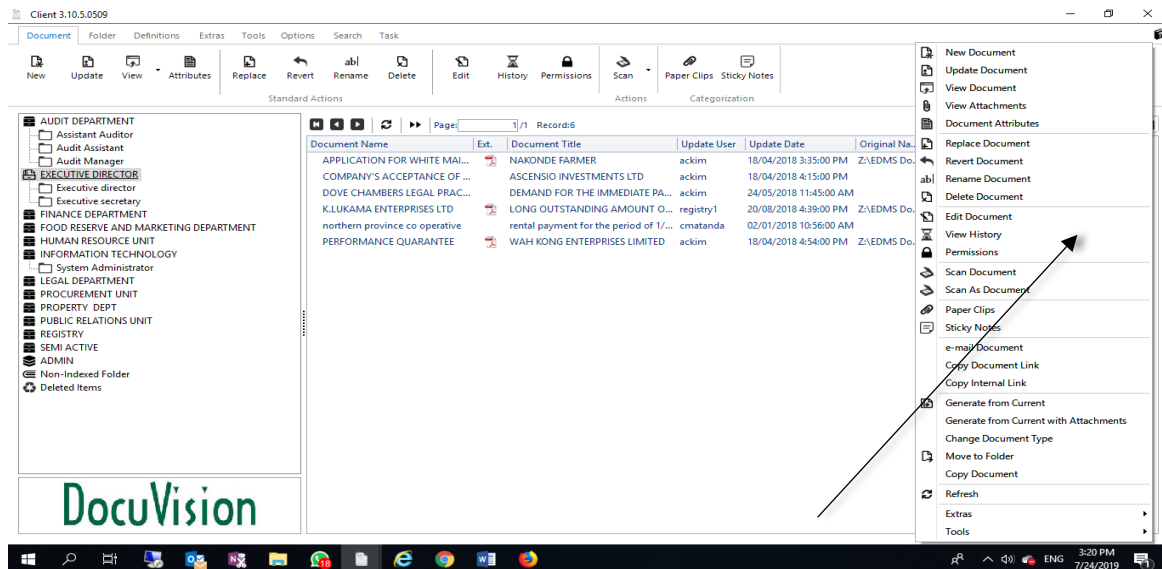
As can be seen below, you can easily perform any function by just right-clicking on any part of the application and you get a drop-down menu to select what action you want to undertake.

You can perform the following tasks easily:

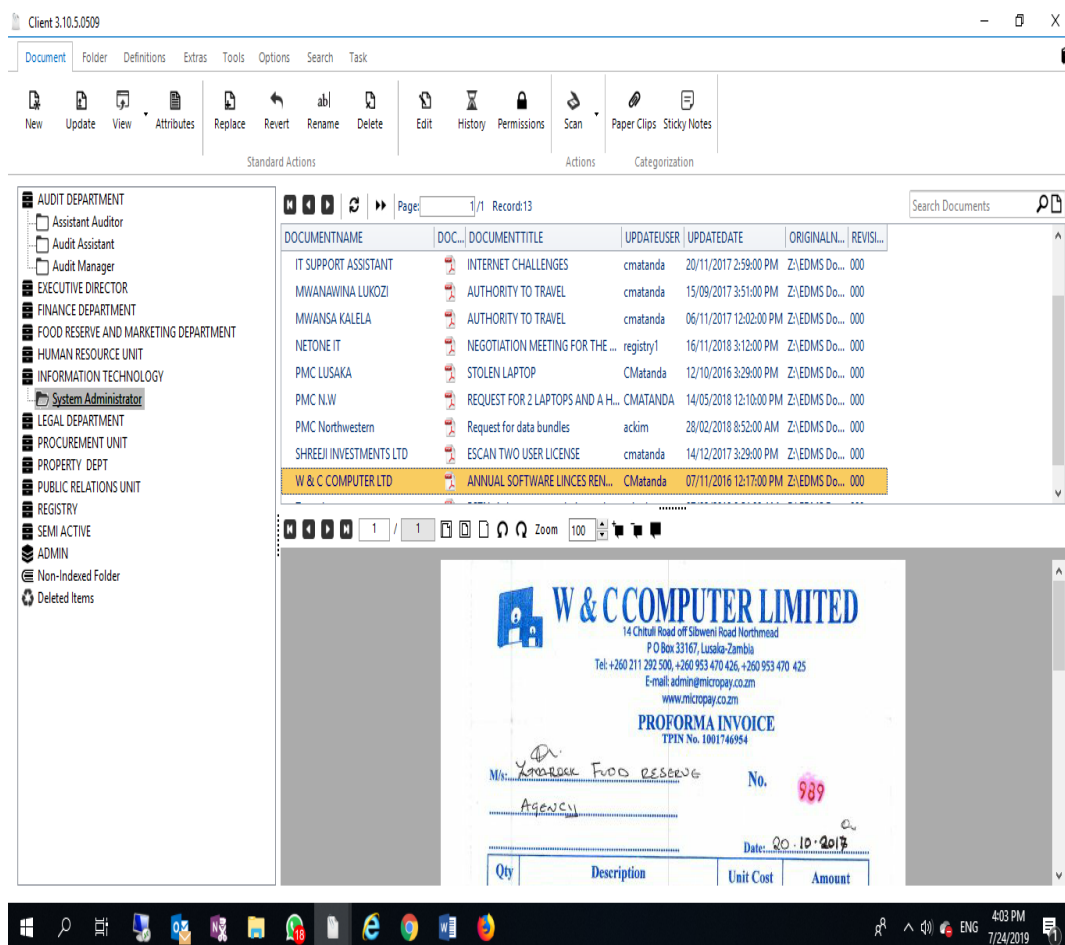
- Create new document
- Update document
- View document
- Add attributes
- Replace a document with another
- Revert to an older document
- Rename a document
- Delete a document
- Edit a document
- View document history
- Assign permission to a document
- Scan a document

- Paper clip a document
- Add a sticky Notes to a document
- Send a document
- Distribute document
- Lock document

In short you can easily perform actions to electronic documents as if you are dealing with paper-based documents.



Viewing a document in the Information Technology folder.



### **Significance of study**

The automation of the document management through the installation of the DocuVision system has directly benefited all the staff of the FRA. The number beneficiary is the staff that work in the Registry Department. Previously, they used to file documents manually and loss of documents was very rampant.

After the DocuVision was implemented, there are no more document losses as these are scanned and placed in departmental folders. The Executive Director's office receives any document on time as and when needed. The Head of Departments also receive documents as and when they need them.

All the departments now have access to the documents that they need to access and this is done by just a click of a button. The solution has brought a new way of managing documents.

### **Conclusion**

The solution to the problem of manual document management in the Registry and other department was resolved by installing the DocuVision application software.

The automation was the only answer to the challenge at hand.

Currently, we are able to manage documents with pride and respond to any demands on document requirements.

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