

docs for Deltek

Document Management and Workflow for Deltek Users

ECP's *docs for Deltek* is a document management and workflow solution that is integrated with Deltek's project- focused accounting and management solutions.

Deltek products provide outstanding tools for managing project-related data, but the information stored in these systems usually only tell half of the story. The other important details are hidden in file cabinets, electronic documents, e-mail, drawings, or other key source documents that are not directly linked with the information kept in Deltek's database. The *docs for Deltek* solution helps close the gap by creating a linkage between information in Deltek products and documents that are commonly stored outside.

MANAGE DOCUMENTS

docs for Deltek provides a secure enterprise-class document repository that users throughout your organization can use to store documents of all types. This includes scanned images, electronic documents (like MS Word and Excel files), as well as e-mail, video or any other file type. With this repository capability in place, you will be able to place greater controls around the storage and retention of electronic files and it will eliminate the challenges associated with sharing paper-based documents.

MANAGE PROCESSES

docs for Deltek provides additional business process management capabilities that allow users to automate and track common business processes—while connecting processes to documents and data stored in Deltek applications. The flexible workflow features allow users to model existing processes or re-engineer processes to be automated and more efficient. Additionally, because processes will be managed by the system, a complete audit trail is maintained which provides key information for managing productivity as well as meeting compliance challenges.

Quantity	Unit	Description	Amount
1		Water Sale Equipment	23,190.00

Subtotal	Tax	Total
23,190.00	0.00	23,190.00

KEY BENEFITS

- Provides seamless access to documents from familiar Deltek screens
- Provides control of business processes that rely on documents and forms
- Meets key compliance demands by establishing and enforcing controls for business processes and records management
- Frees up personnel from time consuming tasks associated with searching, retrieving, copying and refilling paper
- Provides access to a secure centralized electronic document repository based upon user access rights

Solutions Designed for Your Needs

docs for Deltek is a modular solution-suite with easily deployed components that are pre-configured to address your business needs.

Document Management

As the foundation, this module provides a central document repository with common system components—including scanning/document capture, document retrieval and system security. Links between the repository and designated Deltek screens enable users to view associated repository documents. Once in place, organizations can immediately capture incoming documents electronically, facilitating on-demand access for users. This foundation can be used for any department or business function providing the framework for your electronic filing structure.

Approval Routing

Building upon the foundation, approval processing, and routing modules can be added to provide automated review, approval, and tracking based on a set of user-defined business rules. Other approval routing functions include:

- **Accounts Payable:**
Pre-configured baseline AP approval process for routing invoices and coding entry into your Deltek system
- **Purchase Requisitions:**
Includes electronic forms for entry of key requisition details prior to routing for approval processing
- **Accounts Receivable:**
Allows electronic expense related documents to be collected and combined to support outgoing invoices
- **HR/Employee Files:**
Provides on-boarding, employee management and separation driven by a virtual employee file using a common file-folder layout
- **Project Documents Repository:**
Leveraged to create a central repository for project related documents

docs for Deltek – powered by OnBase

docs for Deltek is powered by Hyland Software's OnBase Enterprise Content Management (ECM) software. OnBase is a fully integrated ECM suite used by over 9,000 mid-tier and Global 2000 enterprises to capture, route, manage, share and archive high volumes of corporate information critical to business operations and customer service.

The screenshot displays two overlapping windows from a Deltek software application. The background window is titled 'Vendor Details' and contains a form for 'Advanced Mechanical Technologies'. Fields include 'Invoice' (1125/2004), 'Voucher' (000959), 'Address' (176 Waltham Street, Watertown, MA 02471), and a 'Voucher Line Items' table. The table has columns for Line, Project, Phase, Task, Account, Description, Amount, and Balance. A single row is visible with Line 1, Project 2000013.00, Phase 03A, Task, Account 529.00, Description LARGE EQUIP R, Amount 4,500.00, and Balance 4,500.00. The foreground window is a 'Desktop Viewer' showing an invoice document for 'Advanced Mechanical Technologies'. The invoice includes contact information for Apple B. Bertlett, PC, Architects and Engineers, and a table for 'EQUIPMENT RENTAL' with one line item for 'Equipment Rental: 9500-12' at a unit price of 4,500.00. A status box indicates 'Status: IN PROCESS'.

As an *ISV Partner* since 2005, ECP offers Deltek clients a wide range of “project-based” workflow automation and document management solutions that support business processes such as: invoice automation, billing, contract management, requisitioning and human resources. These are complimented by our value-added integrations we provide between our content management system and Deltek software.



For more information on ECP, please visit us online at:
www.ECPcorp.com

“We can easily access archived documents from any desktop and process new documents electronically. We no longer need to share a central paper filing system, which allows staff to work faster and more efficiently.”

Gregory Derritt
Director, Business Systems
American Institutes for Research