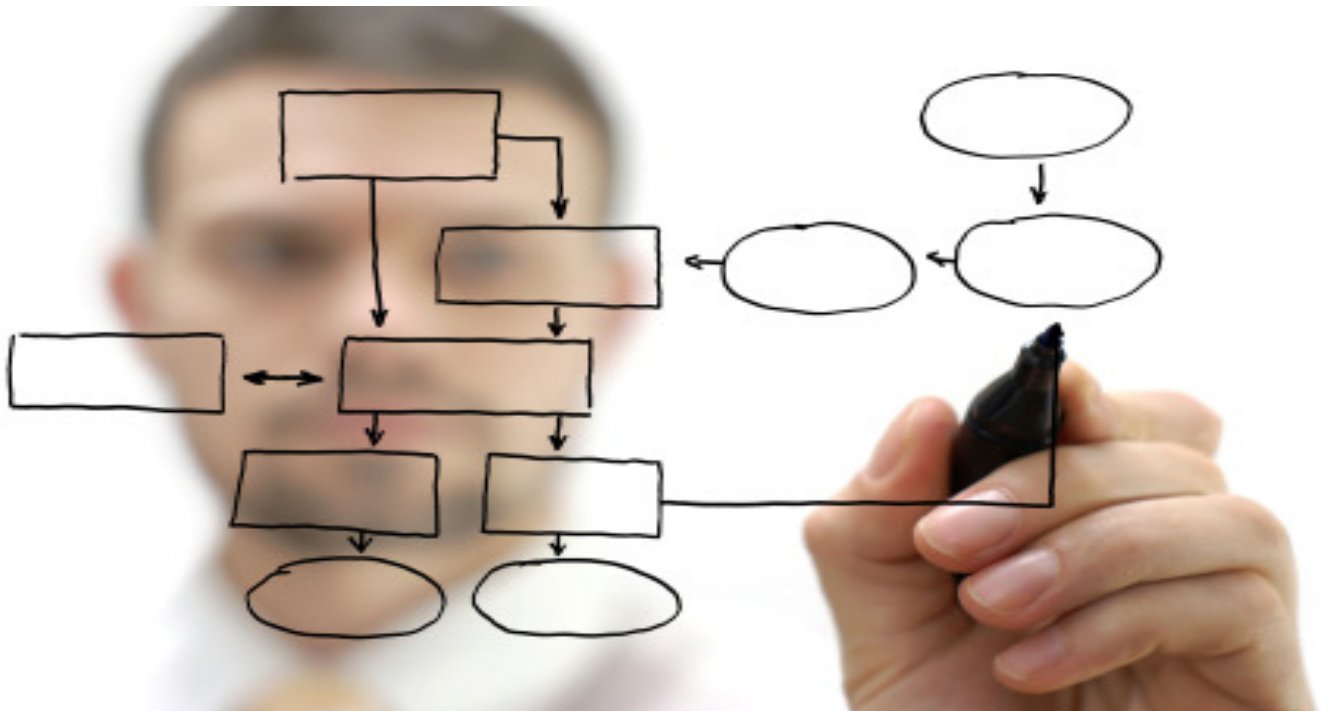# Office Automator
for EPC Management

EPC Management

Is an exacting business where effectively managing complex projects and packages, with compliance requirements, geographically dispersed teams and large amounts of information is challenging. While information systems are key to achieving this, disparate and conflicting information systems often work in isolation from business processes and are poorly aligned with business strategy and objectives.

Office Automator for EPC Management integrates easily into different environments and is designed to automate highly complex EPC workflows, including complex exception handling involving people, applications, information and other systems. With fully featured Enterprise Content Management and Communications Management capabilities, Office Automator for EPC manages document, email and other record creation and retention, ensuring that companies can meet legal obligations in a cost effective manner.

Tight integration with Microsoft Office, provides a familiar platform for most users, while delivering a highly efficient set of Business Productivity Tools.

Dashboards for monitoring key performance indicators allow monitoring of project schedules in real time.

Benefits

Reduce Costs & Improve Productivity
Industry specific automated processes improve efficiency and reduce costs. Users have the tools they need at their fingertips.

Track Everything – Lose Nothing
Every document, drawing, email, attachment, letter, fax and phone discussion is numbered, stored and tracked.

Compliance
Standardized, automated processes are designed to meet ISO9001, ISO20,000 and other standards making compliance, and compliance auditing, simple.

Legal Enforcement and Auditability
Office Automator satisfies record retention requirements for admissible evidence. All transactions, edits and changes are time stamped and fully auditable.

Visibility
Executive Dashboards can be focused to monitor your key project performance indicators

Style Management
Every document, email, fax and letter created automatically complies with corporate standards on a company, project and package level.

Office Automator Business Productivity Tools

OA Transaction Manager

Transaction Manager is the control centre for the built in Enterprise Content Management System. It allows users to access and manage all formal transactions, documents drawings, spreadsheets and other documents to which the user has permissions.

OA Outlook Email Manager

Email Manager integrates within Outlook to provide communications management and tracking in an environment familiar to most users.
Email Manager enables users to: Create emails automated with your business style, registration, coding and revision processes; Register and manage emails and automatically track email threads; Use the centralised contact database

OA Contacts Manager

Contacts Manager is an extended centralised global contact repository for employees and external contacts. Contacts Manager integrates with Outlook Tasks, Outlook Calendar and telephone systems. It also provides Call Journaling – while the user is on the phone they can make, file and email notes about the conversation
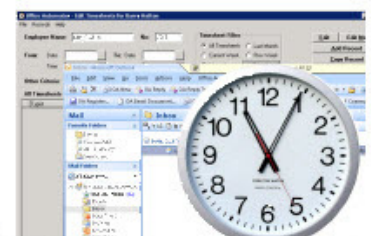
OA Document Generator

Document Generator uses Automated Transaction Templates[1] to create automated reports, invoices, letters or any other predefined documents used within your business. The documents are automated with your business style, registration, coding and revision processes and will automatically be given a transaction number. Files can be cross referenced and associated if required.

OA Mail Manager

Mail Manager provides multiple ways to collect all incoming and outgoing *physical* mail to form a part of your knowledge base by Recording and tracking incoming and outgoing mail, its storage location, location of any electronic copies, cross references and associations.

OA Time & Activity Manager

Provides a powerful tool for capturing staff activity. It manages what tasks employees can book time to and can record time for any activity i.e. phone calls, emails, document authoring etc from within OA tools (Document Generator, Outlook Email Manager etc) as you do your job . This provides the basis for automatically generating Customer invoices, exception reports etc.

OA Revision Manager

Any document created, via an Automated Transaction Template may have a revision schema. There are 17 standard schemas built into the system and custom ones can be added as desired. These schemas can be any combination of Alpha or Numeric, Tiered approvals (up to 3 levels) and support Revisions with snap shots. Authorised users can revise and lock documents at full revision levels. The audit trail is recorded providing traceability of a transaction / document evolution.

OA Communications Tracker

Communications Tracker provides a centralized view of the database of all informal communications including emails, phone call journals and diary entries with powerful filter and search capabilities, including the ability to view email conversation threads.
Communications Tracker is integrated with Outlook Tasks and Calendar functions.

OA Diary Manager

Diary Manager is a personal workspace, where users can maintain their own daily diary and access other tools such as timesheets, as well as view and search their personal: Email correspondence, Phone call journaling and HR details

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[1] For an explanation of Automated Transaction Templates and how Business Process Automation works, see Document OA-13831
OA-14394:DSA04.NGn