

Alliance Group

Alliance PaperChase
the Records Management System

Alliance PaperChase
Alliance PaperChase Viewer

Getting Started Guide

Alliance Group

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Contents

About This Guide

Purpose	4
Prerequisites	4
Related Information	4

1 An Introduction to Alliance *PaperChase*

Introduction	5
PaperChase Enquiries	5
Requesting Files	5
PaperChase Reports	6
File Management	6
Barcodes	6

2 Alliance *PaperChase* Enquiries

Client/Engagement Enquiry	7
File Enquiry	8
Box Enquiry	9

3 Alliance *PaperChase* Reports

Reports	10
Engagement List	11

4 Requesting Files

Requesting Files	12
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About This Guide

This guide introduces Alliance*PaperChase*, explains what Records Management is, and shows you how to get started by performing some common tasks.

Purpose

The Getting Started Guide provides general information about concepts, describes the features of Alliance*PaperChase* and shows you how to perform several operations.

Prerequisites

To use this product, you need to be familiar with the Microsoft Windows 95, 98, 2000 or NT 4.0 environment. If you are using a printer or scanner, you should also know how to connect and operate the device.

You will need to have the PaperChase database installed (typically on a Server) and the PaperChase Client software installed on your PC.

Related Information

This guide helps you to get started with the application. For information about the application and how to perform additional tasks, refer to the online help.

The Release Notes (if any) provide important information including last-minute changes to the documentation.

For updated product information and general information about Alliance *PaperChase*, contact your reseller.

An Introduction to Alliance PaperChase

The AlliancePaperChase Records Management System indexes your paperwork comprehensively and brings savings in storage space and costs. Instead of searching for a stray document, AlliancePaperChase enables you to find and retrieve it!

AlliancePaperChase uses barcodes attached to every File (folder) to identify and track any item such as incoming mail, internal documents, forms, drawings, client files and archived material.

Each file is given a unique barcode to identify it. An item may be registered to a location simply by scanning its' barcode identification label.

A full movement history of each item is retained so that all movements can be seen from the date of creation, providing a full audit trail.

AlliancePaperChase stores information about Clients (which may be referred to as Cases, Engagements, Matters, Projects, Jobs or whatever you prefer), Files and Boxes.

Files may be retrieved by either browsing through the system or by searching for a given Client/Engagement or File.

An optional module will store your scanned (image) documents or electronic documents generated in Microsoft Office or other applications, so that all your information may be comprehensively stored; scanned documents may be filed away with related word-processed files or spreadsheets, for example. These may then be displayed on screen when required.

Other modules allow COLD (the storage of output from print files) and OCR (converting scanned images to editable text).

AlliancePaperChase may also be used over Internet or Intranet systems.

PaperChase Enquiries

On screen enquiries are provided to allow searching for details including:-

Engagement Enquiry

File Enquiry

Box Enquiry

Requesting Files

Files may be ordered for delivery by using the File Request options within the Enquiries.

PaperChase Reports

Reports are available on screen or on paper, including:-

Client (Engagement) List

Client (Engagement) Details Report

Together with Exception Reports such as :

Clients (Engagements) without Files Report

Unregistered Files Report

Files Not Moved Report

Audit Reports such as:

File Movement History Report

Box Movement History Report

File Management

PaperChase Users with appropriate rights may also manage Files including the following options:-

Create File Labels

Create Box Labels

Register a File

Register a Box

Put Files in Boxes

Move Files

Move Boxes

Barcodes

Barcodes are the key to PaperChase files. Every file, box and location has a barcode which can be read with a bar-code scanner to recognise a file or box number or a location.



The AlliancePaperChase Records Management System is AllianceGroup software.

Alliance PaperChase Enquiries

PaperChase provides the ability to enquire by Client/Engagement, File or Box.

Client/Engagement Enquiry

Client/Engagements may be viewed by selecting Client/Engagement Enquiry from the Enquiry Menu and then entering some known data, such as the Engagement Number or Name, and pressing **Find**. All Engagements meeting the entered data are returned.

The **Grid** option allows a table of the returned Engagements to be displayed, otherwise the first Engagement is displayed and the 'video' style buttons may be used to move to other Engagements. The **Files** button displays a table of all the Files registered to the displayed Engagement.

The **Statistics** button displays a summary of all the Files registered to the displayed Engagement. Files may be ordered by selecting a file, pressing the right mouse button and selecting '**Add to Retrieval List**'

PaperChase - [Engagement Enquiry]

File Enquiries Maintenance Movements Reports Destruction Reports Tools Window Help

Engagement No. 000001-002 Secure Engagement Alt.Reference Date Appointed

Engagement Name Alliance Business Computers Ltd

Relationship Name Alliance

Contact BROWN J

Partner SMITH F

Office AAA

Department 200 Audit

Files registered to this Engagement

File No.	Description	Alt. Ref.	DateCreated	ReviewDate	Location	
0000000002	Board Minutes 1999	ALT	01/12/1999	31/12/2001	X100LHFR01A001	8
0000001009	1999 Audit	qqq222	11/08/1999	11/08/2006	L0000014	9
0000001010	1999 Audit Part 2		11/08/1999	11/08/2006	L0000014	9
0000001018	File 1018	1018	01/08/2000	01/08/2000	X100LHFR01A001	
0000001031			05/06/2000	05/06/2007	L0000003	
0000001032			05/06/2000	05/06/2007	L0000003	
0000001043			07/10/2000	07/10/2007	L0000002	0

Engagement: 3 of 21+ Find Clear Grid Files Statistics Print

PaperChase S

File Enquiry

Files may be viewed by selecting File Enquiry from the Enquiry Menu and then entering some known data, such as the File Number or Engagement Number, and pressing **Find**. All Files meeting the entered data are returned.

The **Grid** option allows a table of the returned Files to be displayed, otherwise the first File will be displayed and the 'video' style buttons may be used to move to other Files.

The **History** button displays a table of all the movements of the displayed File (an Audit Trail).

Files may be ordered by selecting a file, pressing the right mouse button and selecting '**Add to Retrieval List**'

PaperChase - [File Enquiry]

File Enquiries Maintenance Movements Reports Destruction Reports Tools Window Help

File No: 000000009 Secure File Alt.Reference: []

Description: File 9 - Audit line 2

Engagement No.: 000001-001 Alliance Computer Holdings Ltd.

File Type: Miscellaneous

Office: AAA

Department: 100 Admin

Location: X100LHFR01A001 External Store,Ground Floor,Left Hand side

Date Created: 07/09/1997 Review Date: []

Destruction Status: DA Destruction Agreed

Box Number: 96/00001

File History					
Date	Action	From Location	To Location	By	From Box
07/09/1997 00:00	C		L0000002	MP	
03/01/1998 11:11	M		L0000002	MP	
19/11/1998 16:39	M	L0000002	L0000002	SHN	97/00001

File: 9 of 78+ Find Clear Grid History Print Ref

Box Enquiry

Boxes may be viewed by selecting Box Enquiry from the Enquiry Menu and then entering some known data, such as the Box Number or Location, and pressing **Find**. All Boxes meeting the known data are returned.

The **Grid** option allows a table of the returned Boxes to be displayed, otherwise the first Box will be displayed and the 'video' style buttons may be used to move to other Boxes.

The **Files** button displays a table of all the Files in the displayed Box.

The **History** button displays a table of all the movements of the displayed Box (an Audit Trail).

PaperChase - [Box Enquiry]

File Enquiries Maintenance Movements Reports Destruction Reports Tools Window Help

Box Number: 00/00013
 Dept. Ref.: AA1
 Security Level: 1
 Location: CS38NEFR01A001 Canada Square, Floor 38, North East
 Date Created: 07/10/2000
 Date Moved: 07/10/2000
 Review Date: 07/10/2007
 Destruction Status:
 Notes:
Files in this Box

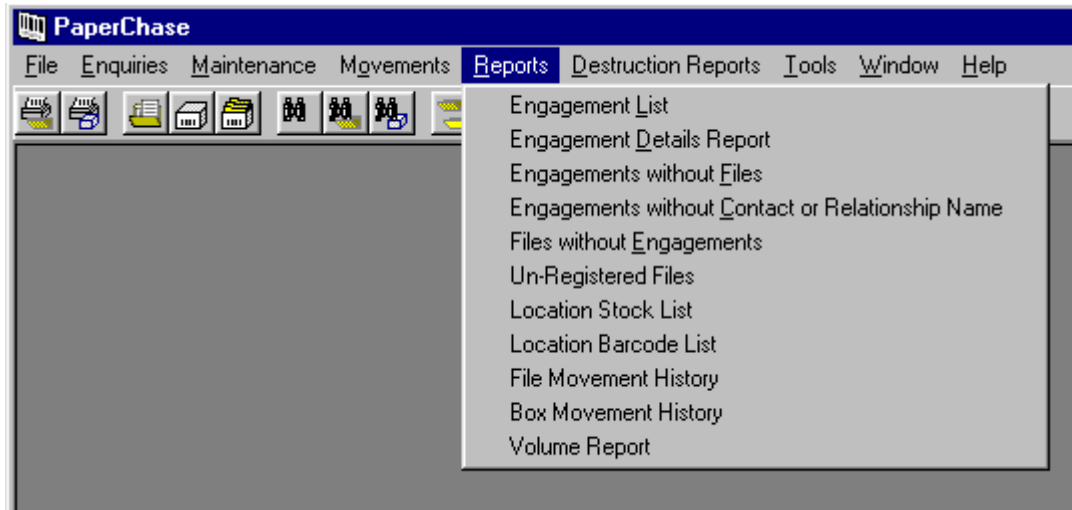
File No.	Description	Alt. Ref.	Engagement	Type	DateCreated	Review
0000001043	Permanent File		000001-002	X	07/10/2000	07/10/
0000001044	Audit working papers		000001-001	M	07/10/2000	07/10/

Box: 4 of 39+ Find Clear Grid Files History Print

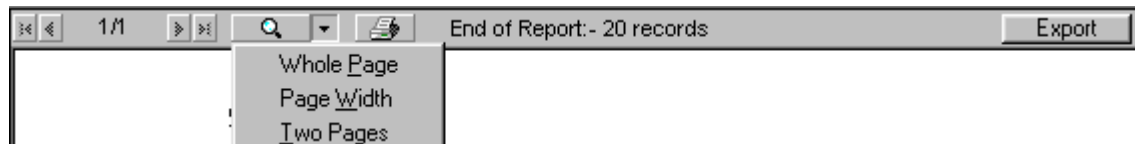
Alliance PaperChase Reports

PaperChase provides reports on Engagements, Files, Boxes and Locations. Most reports may be viewed on the screen or printed.

A number of reports are available as listed below:-



Screen reports have their own toolbar to allow moving between pages, zooming, printing, exporting and e-mailing.



Reports may be displayed on screen, printed, saved to disk in a number of formats including Acrobat, Word, Excel and Text. These may also be e-mailed directly from PaperChase.

Engagement List

This report is shown as a typical example.

The Engagement List provides a report of all Engagements (Cases or Jobs) as shown below. In common with most reports this may be printed directly to the printer or displayed on screen first and then printed, saved as a file or e-mailed. The 'greenbar' and grid lines are optional.

PaperChase

Engagement List

Engagement	Name	Relationship	Appointed	Office	Cost Centre
000004-001	Aardvark Enterprises plc	Aardvark	31/12/1999	AAA	600
000002-001	Alliance Building Co.	Alliance	01/02/1998	ABB	400
000001-002	Alliance Business Computers Ltd	Alliance	29/02/2000	AAA	200
000001-001	Alliance Computer Holdings Ltd.	Alliance	31/12/1999	AAA	100
000001-003	Alliance Document Solutions Ltd	Alliance	31/12/1998	AAA	200
000001-009	Alliance Test	Alliance		AAA	100
000012-001	City and Town Services International plc	CITY SERVICES INTERNATIONAL GROUP	01/01/2000	ABB	400
888888-888	Eights			AAA	200
000005-002	Five Group Ltd			AAA	100
000005-010	Five-Ten Stores Ltd	Five		AAA	600
Z00000-008	Internal	INTERNAL	01/01/2000	ACC	500
000013-001	International Group plc	INTER		BBB	300
000013-002	International Group plc - Merger			BBB	300
000008-001	Local Accountants Ltd			AAA	100
000007-001	North Atlantic Resources Inc	North Atlantic		AAA	200
000008-001	Northway Ltd	Northway		AAA	200

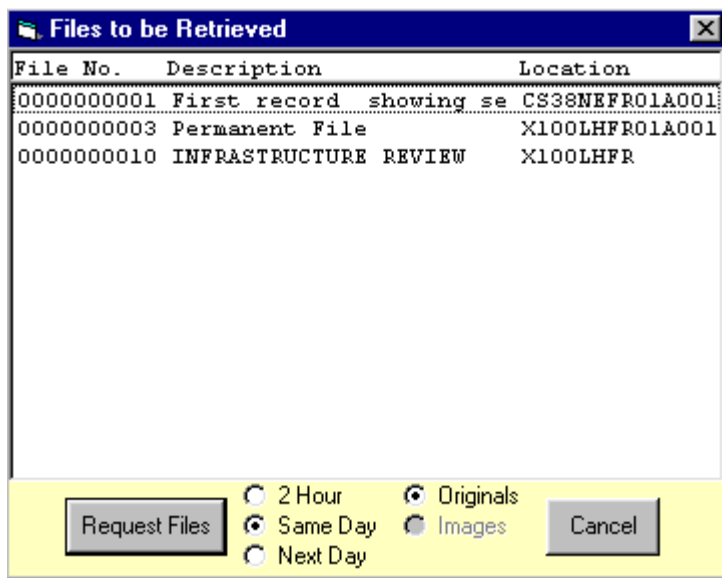
Requesting Files

Required files may be ordered by building up a list and then requesting delivery.

When a file is listed on the screen (in Engagement Enquiry or File Enquiry) you may click on the file to select it and then press the **right mouse button** to display the following popup menu:-



Choosing 'Add to Retrieval List' will add this to the list of files you wish to order. 'View Retrieval List' will display the current list:-



To place an order for the list of files select the delivery requirements (eg same day or next day) and then press Request Files.

If you have the optional imaging module you may view scanned files without placing a request, or you may request paper files to be scanned.