

**BUILDER
INFORMATION
SYSTEM**

**BIS[®]
Document Link & Imaging
Module Manual**

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Conventions Used In This Manual

Every effort has been used to try to make this manual as useful and informative as possible. To accomplish that goal, several conventions have been used to assist the reader.

Caution

These boxes contain warnings about things the user **MUST** check or of items the user should be aware before proceeding. In many cases, the advice is to check with the C.P.A. or other tax advisor.

Tip

Tips offer special information, considerations, or other insights when undertaking the task described.

Hyperlink

A hyperlink is shown with an underline as it is shown by default in the program. Hyperlinks may be found in screen forms or in screen previews of reports.

In some instances, individual screen buttons are shown in the text, such as the Magnifying Glass  icon.

Section 1 – Overview

The Document Link & Imaging module is a powerful addition to BIS[®] that allows construction offices to move rapidly into the 21st century. All resources related to BIS[®] transactions, master files, and reports can now be linked quickly and easily, enabling users to centralize supporting information. The resources links are only limited by the software on the computer.

Here are just a few examples:

- Link blueprints and job site photos to job files.
- Link actual accounts payable scanned invoices to Vendor Invoices.
- Relate external work orders to figures on job cost reports.

Users can do all this and more with Document Link. The Document Link module helps companies to be more efficient by allowing users to centralize support files quickly and intuitively.

The easy-to-use interface lets users organize all needed files into folders, alphabetically or by file type. Descriptions and notes can be added so that users know exactly what information the file contains. The image button in Document Link can initiate a scanner. Linking documents is easy and intuitive. Company staff can use Document Link to centralize job information, allowing for better communication on projects.

The BIS[®] Document Link module lets users create a mail merge from within the program. Use existing vendor, employee, customer, and job lists already stored in BIS[®]. Document Link intelligently works with Microsoft[®] Word[®] to use any template desired to create a filtered merge. For example, users can create bid requests and employee notices specific people. These unique merge capabilities can save an enormous amount of time. Document Link makes it easy to create the documents companies need.

BIS[®] Document Link lets users export most master record data into an Excel[®] spreadsheet. Use existing master records already stored in BIS[®]. Document Link intelligently works with Microsoft[®] Excel[®] to create a filtered spreadsheet. For example, users can create tables of employees with data selected with flexible criteria. This unique export feature can save an enormous amount of time. Document Link makes it easy to create the additional spreadsheet records companies may need.


BIS[®] Document Link lets users capture documents easily from scanners or digital cameras. The program provides a powerful tool to link to scanners and digital cameras. There is no need to exit BIS[®] to capture files. BIS[®] lets users manage all sources for digital imaging. When scanning, users have control over the resulting file format, the resolution, and the image size. BIS[®] Document Link provides on-the-fly ability to create resources.

If a quick map is needed for a job site or vendor location, the program seamlessly integrates with Microsoft[®] Map Point[®] 2004. Simply click on the Map Point[®] toolbar button in BIS[®] and MapPoint[®] automatically displays map information from the selected address in BIS[®]. (The feature is available only with users who have installed MapPoint[®] 2004.)


For the remainder of the manual, the Document Link & Imaging module may be abbreviated and referred to as DL.

Section 2 – Menu Access

Access to Document Link functions is different from most other modules in BIS®. With most other modules, users can access their functions by either using the module menu or using the standard menu, accessing the particular module function needed.

The Document Link functionality can be accessed from most master record or transaction entries by clicking on the paperclip  icon on the toolbar. Documents can be linked either individually or as a part of an existing folder.

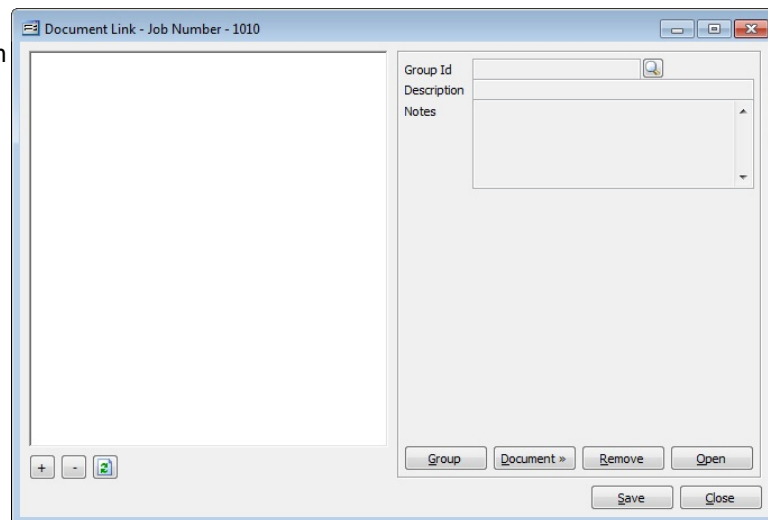
Access from Master Records

This section of the Document Link & Imaging covers adding and editing the links from master records. The example will focus on two master records, Jobs and Employees. When the record is complete or satisfactorily edited, either click on the Save  button or press Ctrl-S to save the changes.


New Link

When initially accessing Document Link from an existing job master record, the menu opens the Document Link - Job form. The form is used to enter new group and document information (and access previously linked files).

Figure: DL-1
Document Link new screen form from Job master record.



Accessing Existing Links

The list of existing document links may be examined by opening a master record or transaction with links and clicking on the Document Link paperclip  icon on the toolbar (at the top of the screen).

To edit existing links, right-click on the item of interest, and select the desired action from the pop-up menu options.

Figure: DL-2
Pop-up menu after right-clicking on an existing document link.

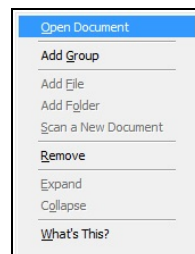
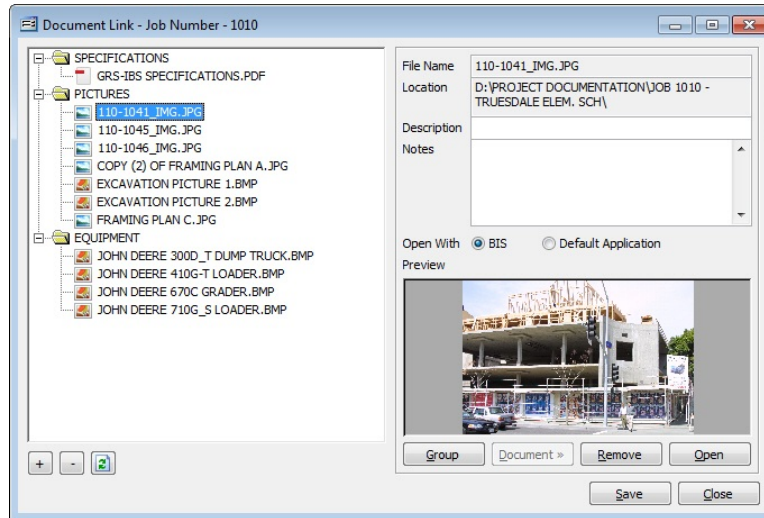



Figure: DL-3
Document Link sample screen showing existing documents that can be edited.



Folder/File Tree

The left portion of the screen has a Folder/File tree similar to what is available in Windows Explorer[®]. It shows the two or three primary linked elements: Groups or Folders, and Files. In the example shown in Figure: DL-3, the groups are Specifications, Pictures, and Equipment.

Expand Button

 As with other sections of BIS[®], the folder/file tree can be expanded by using the plus button icon.

Collapse Button


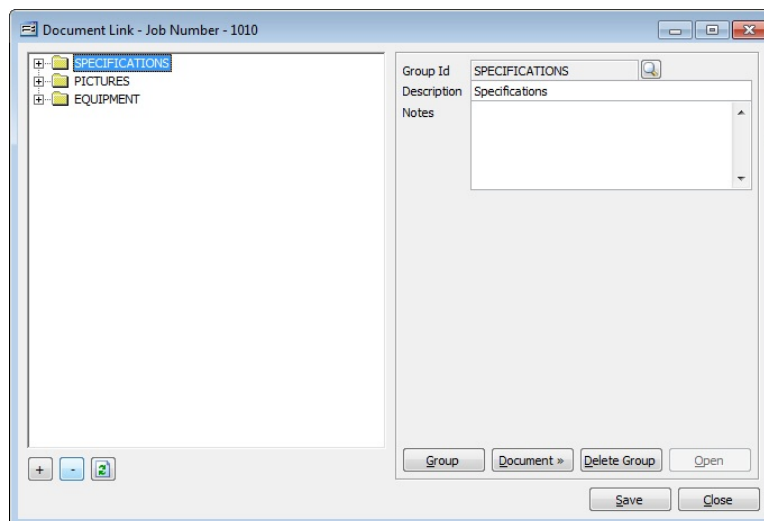
 Similarly, the list can be collapsed by clicking on the minus button icon.

Figure: DL-4
Document Link sample screen showing collapsed folder tree.




Refresh

 The folder and file listing can be updated by using the Refresh button icon.

Group Id

The Group Id field appears in the upper right section of the screen and serves two purposes:

1. It lists the name of the Group Id being highlighted in the Folder/File tree to the left.
2. For a new Group, the name, consisting of 20 or less alpha or numeric characters is entered in the field. The Search tool icon  can be used to use a Group name that has been created.

Description

For new Groups, enter a description for the group. For existing groups, the name will be seen in this field.

Notes

For new Groups, enter an optional note in this field. For existing groups, the notes will be visible in the field.

Open With

The Open With choices are only available if the cursor focus is on a graphics file rather than a different file type, a group, or a folder in the folder/file tree. When the focus is on a graphics file, the choices are BIS® or Default Application. The default application would be an installed graphics application program associated with the particular graphics file selected.

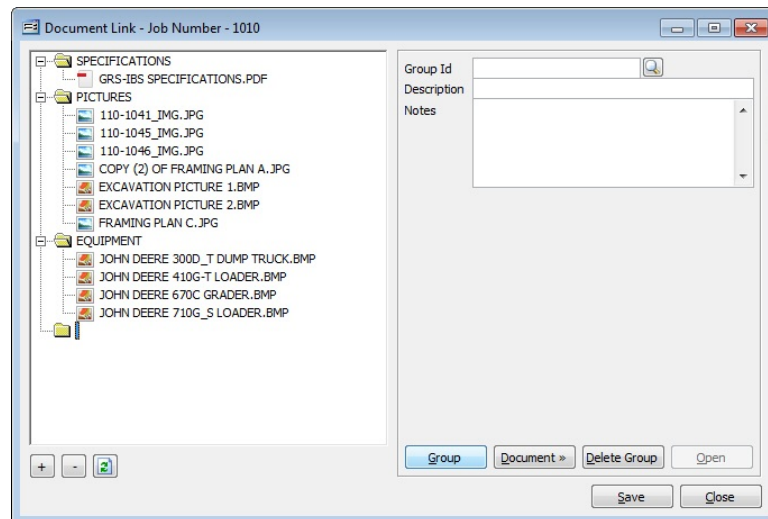
Preview

When the selected link is to a graphics file, a preview will appear in the Preview window.

Group

Clicking on the Group button allows the creation of a new group of documents. Note that a new empty folder will be added to the tree to the left.

Figure: DL-8
Document Link sample screen showing new unnamed group.



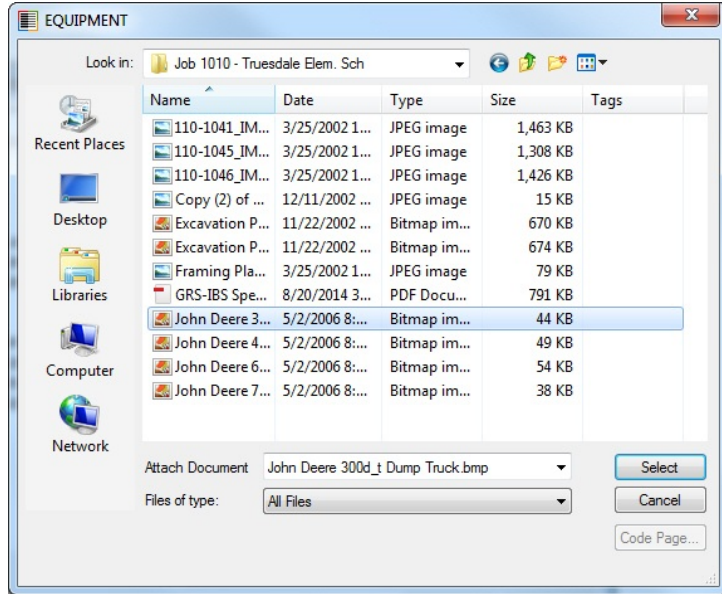
Document

The document button offers three choices:

1. **File**

This choice opens a Windows Explorer applet that enables the user to search and select the file to be linked in the group. Simply highlight the file and click to select it.

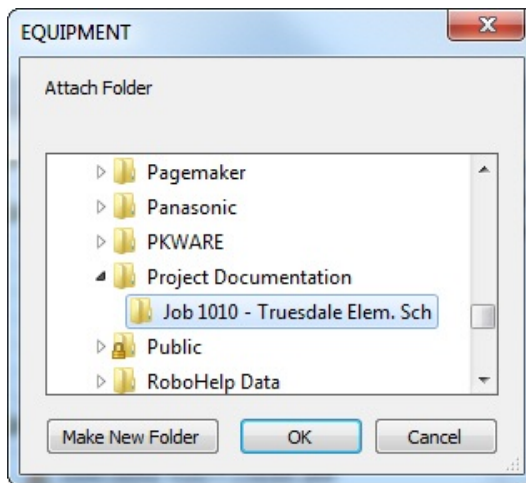
Figure: DL-9
Document Link Document button File selection applet.



2. **Folder**

This choice opens a Windows Explorer applet that enables the user to search and select the folder to be linked to the record. Simply highlight the folder and click on the OK button to select it.

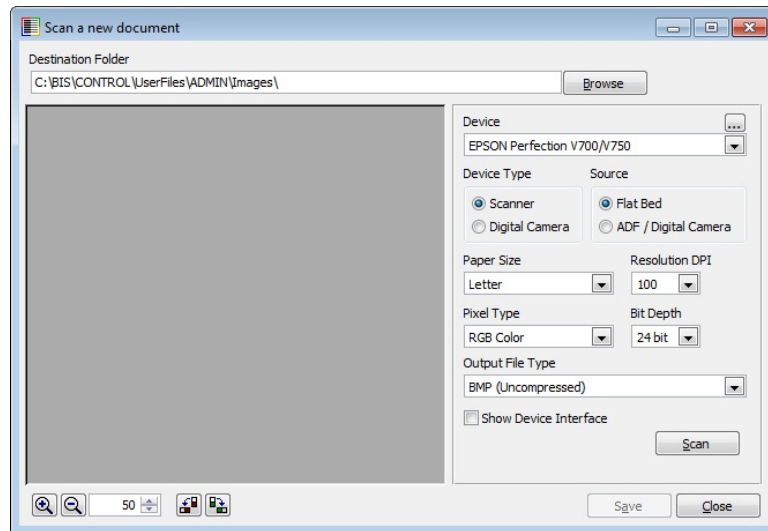
Figure: DL-10
Document Link Document button Folder selection applet.



3. Scan a New Document

This selection opens the scanning functionality pre-existing on the computer. The functions of the screen are covered in the following [section](#).

Figure: DL-11
Document Link Document
button Scan selection
applet.



Delete Group

The button appears only if the focus is on a group or folder. It allows the user to delete a group, but only if the group has no linked files with it. A message will appear if the Delete Group button is chosen before the group is empty.

Remove

The button appears only if the focus is on a linked file within a group. It allows the user to delete the selected link from the group. The button will be inaccessible if the focus is on a file within a folder.

Open

This button allows the user to open the selected file, but only if the file is associated with an installed program.

Tip

Be certain that the program needed by the file is installed or available on the workstation being used to access it. Files with no association can be linked, but cannot be accessed on workstations without the associated program.

Save the Changed Record

When the document links are complete or satisfactorily edited, clicking on the Save button will save the changes.

Close

Clicking on the close button will close the screen, saving no changes since the last save.

Section 3 – Scan a new document

The “Scan a new document” window contains functionality that permits users to activate installed scanning equipment or access a digital camera.

Destination Folder

The program will use its default program location, but the user can change it by entering it directly or by using the Browse button.

Device

This line lists the image devices available to the computer. The drop-down tool can be used to see and select the available devices.

Device Type

Two radio buttons offer the choice of Scanner or Digital Camera. The choice of this selection controls the next set of buttons

Source

Two radio buttons offer the choices of Flat Bed or ADF/Digital Camera. If the Device Type selected is Scanner, either of the Flat Bed or the ADF/Digital Camera selections is available. If the Digital Camera Device Type was selected, then the ADF/Digital Camera is the only selection available.

The terms “Flat Bed” and “ADF” both refers to scanners. ADF is the acronym for Automatic Document Feeder. Please note that both an automatic document feeder scanner and a digital camera potentially will have multiple images from which to select. A flat bed scanner will only have one image at a time.

Paper Size

The paper size refers to the available paper sizes for the scanning device. The selections are: Letter, Legal, A4, B5, and A5.

Resolution DPI

The Resolution DPI (Dots Per Inch) refers to the size and detail of the image to be scanned. The available choices are 75, 100, 150, 200, and 300.

Pixel Type

The Pixel Type refers to the type of image. The available choices are: Black and White, Gray Scale, RGB Color (where RGB refers to Red, Blue, and Green), and Palette Color.

Bit Depth

The Bit Depth refers to the detail of the image to be scanned.

Output File Type

The Output File Type refers to the file types in which the scanned image may be saved. The available choices are:

Black & White

Bit Depth: 1 bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- TIFF (Uncompressed)
- TIFF (CCITTRLE)
- TIFF (Group 3-1D)
- TIFF (Group 3-2D)
- TIFF (Group 4)
- TIFF (Packbits)
- PNG
- PCX

Grayscale

Bit Depth: 4 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- TIFF (Uncompressed)
- TIFF (Packbits)
- PNG
- PCX

Grayscale

Bit Depth: 8 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)
- TIFF (Packbits)
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX

RBG Color

Bit Depth: 24 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)
- TIFF (Packbits)
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX

RBG Color

Bit Depth: 36 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- TIFF (Uncompressed)
- TIFF (Packbits)

Palette Color

Bit Depth: 4 Bitt

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- TIFF (Uncompressed)
- TIFF (Packbits)
- PNG
- PCX

Palette Color

Bit Depth: 4 Bit and 8 Bit

- BMP (Uncompressed), where BMP refers to Bitmapped
- BMP (Compressed)
- JPEG (Standard DCT)
- JPEG (Progressive DCT)
- TIFF (Uncompressed)
- TIFF (Packbits)
- PNG
- FPX (Non-compression)
- FPX (JPEG Compression)
- PCX

Show Device Interface

This option allows the program interface of the selected device to be displayed on the screen.

Scan

This button activates the selected scanning function. When the scanning function is activated, the computer's scanning program will be activated.

Figure: DL-12

Example of a scanning program activated from within BIS[®] with the Device Interface displayed.

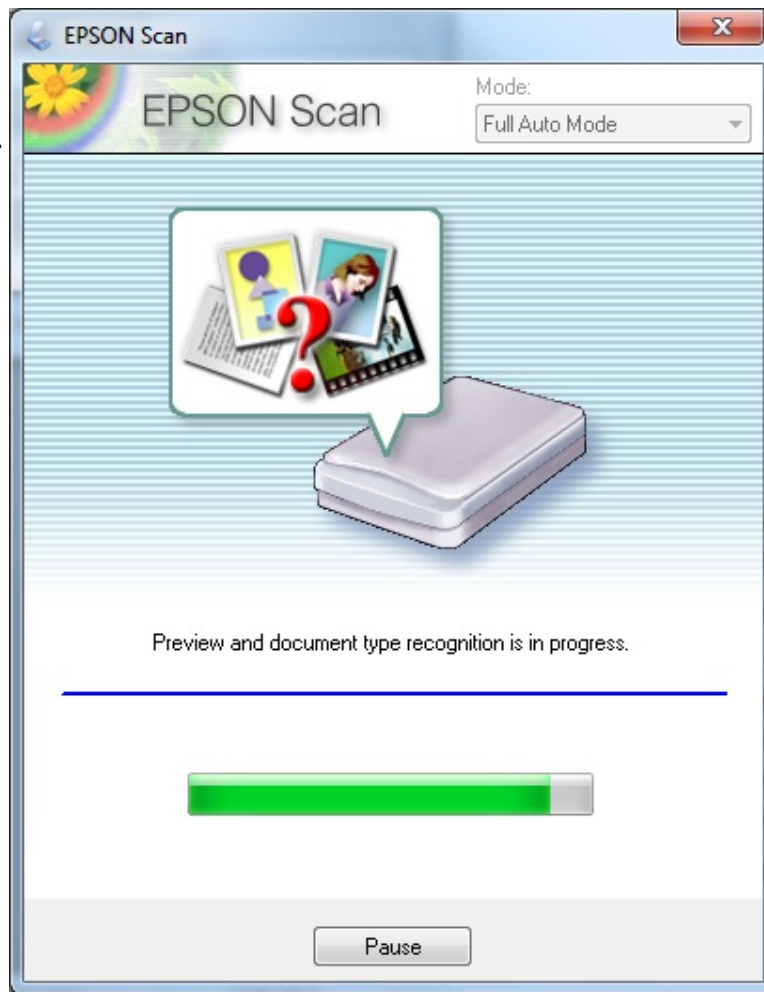


Image Controls



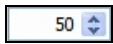
Zoom In

The Zoom In button enables the user to enlarge the image.



Zoom Out

The Zoom Out button enables the user to decrease the image size.



Zoom Setting

The Zoom Setting field enables the user to set the percentage of enlargement or reduction of the image size.



Rotate Left

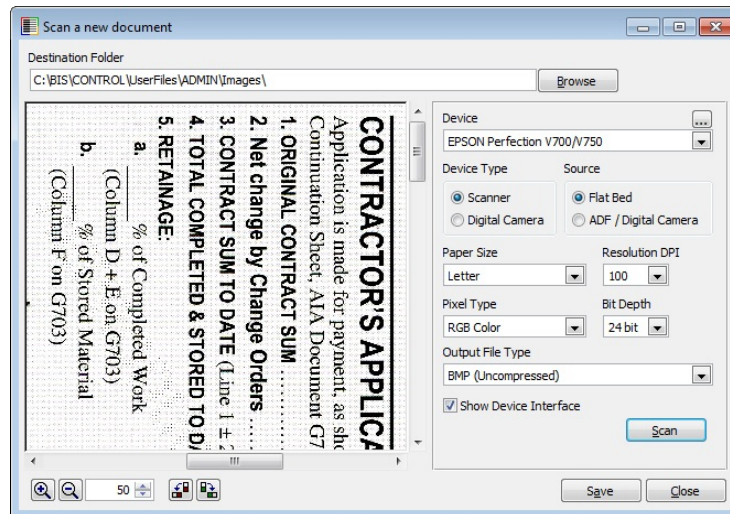
The Rotate Left button enables the user to rotate the image 90° counterclockwise.



Rotate Right

The Rotate Right button enables the user to rotate the image 90° clockwise.

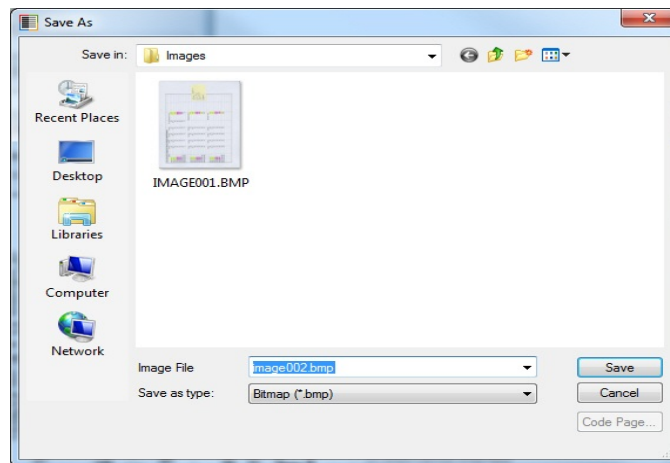
Figure: DL-13
Example of a scanning process activated from within BIS®.



Save

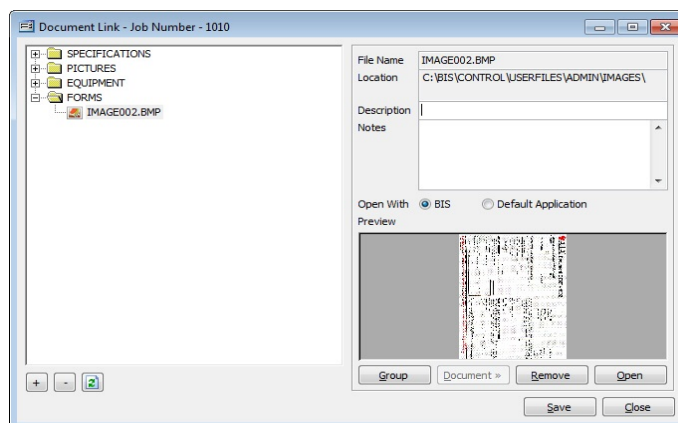
When the scan and settings are complete or satisfactorily modified, clicking on the Save button will save the changes. The user will be offered a Save As screen to place the saved file in a designated location, and give it a distinctive name.

Figure: DL-14
Saving and naming the scanned document.



The resulting image is then available for a preview, or it can be opened for a large screen examination.

Figure: DL-15
Scanned image shows in the Preview window.



Close

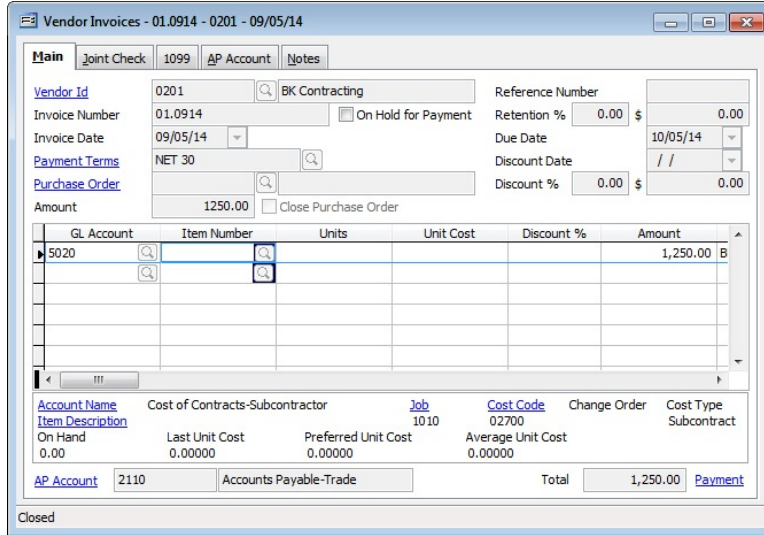
Clicking on the close button will close the screen.

Section 4 – Document Link to a Transaction

Using the methods already described, documents can be linked to transactions. The following is an example of linking the scanned image of a vendor invoice to the invoice entry in Accounts Payable.

The invoice is entered normally in Vendor Invoices and then saved.

Figure: DL-16
Entry of invoice into AP Vendor Invoices.




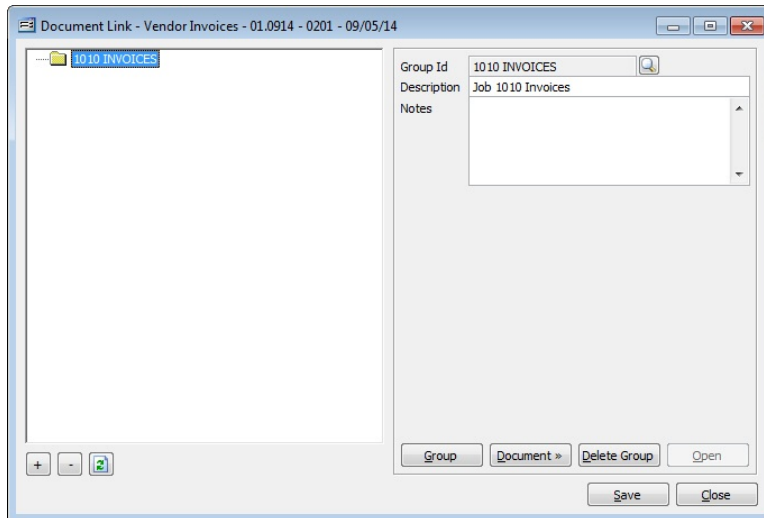
Clicking on the Attached Documents  opens the Document Link – Vendor Invoices function. It may be necessary to create a new Group. This selection could be based on the job, vendor, or some other organization.

Figure: DL-17
Create new Group for invoices.



Then scan the actual invoice document.

Figure: DL-18
Scan the document, Showing the Device Interface.

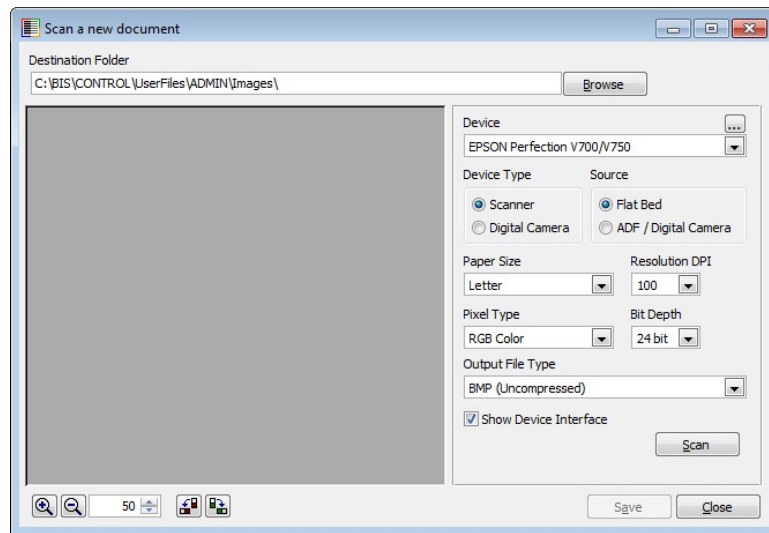
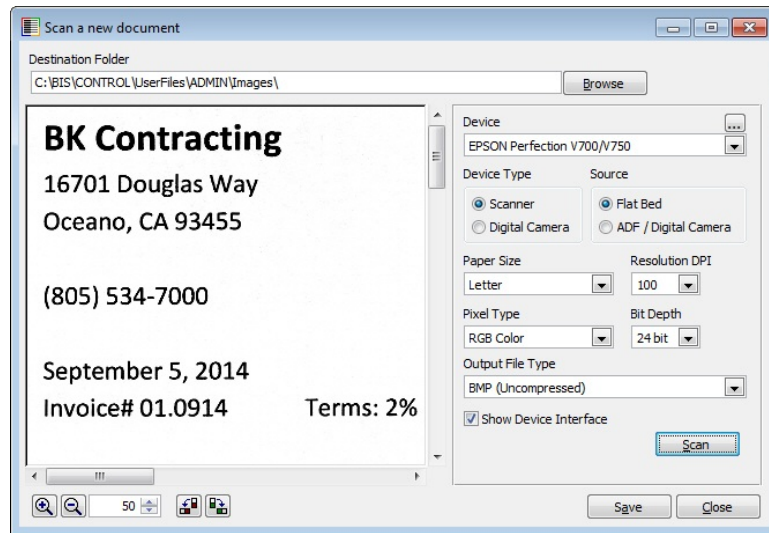


Figure: DL-19
The scanned document shown in the preview of the BIS® scan function.



The image is saved, and the link is saved.

Thereafter, the actual invoice image is available to other users (with access rights) for review by accessing the transaction record, clicking on the Document Link paperclip icon, and opening the linked image, either using BIS® or the associated application. It may be printed from the application that opens the file.

Figure: DL-20
Accessing the scanned,
saved image of the
invoice.

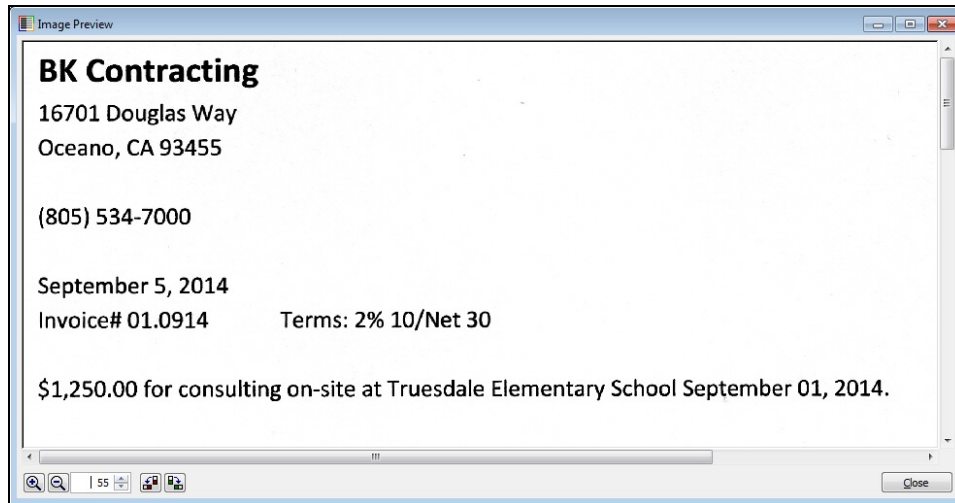
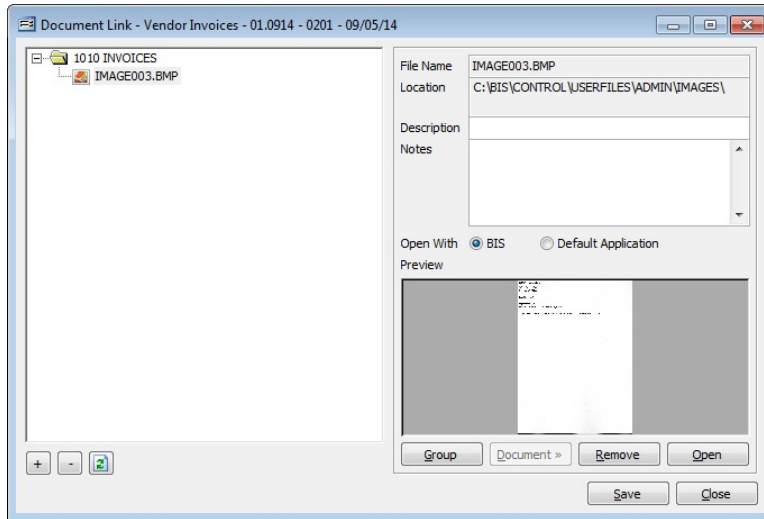


Figure: DL-21 The scanned, saved image, viewed on the screen and printed.

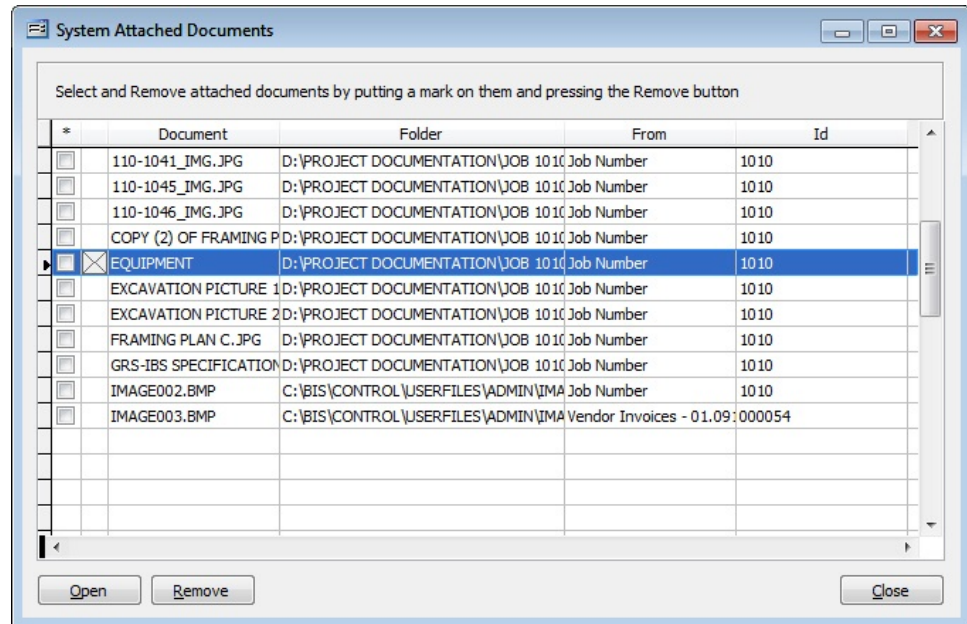
Section 5 – Administrator – Attached Documents

This form displays all the documents attached to forms using the BIS® Document Link & Imaging system. Check a document and click Open or Remove to view or delete the document.

Attached Documents - Menu Access

Administrator | Attached Documents

Figure: DL-22
System Attached
Documents screen form.



*

This column is used to mark the documents that are to be removed from the system. Clicking on the box of the designated line in the column will enable the document link to be removed.

An “X” in the next column indicates that an entire folder (not a file) has been linked.

Document

This column displays the document file name.

Folder

This column displays the path to the folder that contains the file listed.

From

This column displays the source of the record displayed.

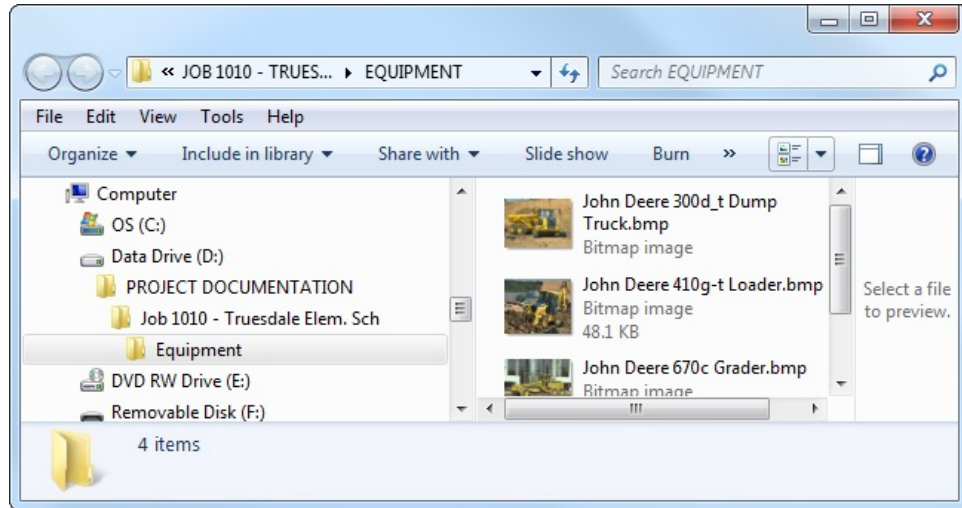
Id

This column displays an identification number associated with the source record.

Open

The Open button enables the selected document to be opened by its associated program. If the Open button is used on a folder, thumbnail images of all of the documents in the folder will be displayed (if set as the default).

Figure: DL-23
Display of thumbnail images of files with an attached folder.



Remove

The Remove button will delete the link to the document that had been established. It is important to note that the underlying document is NOT deleted; just the link is removed.

Close

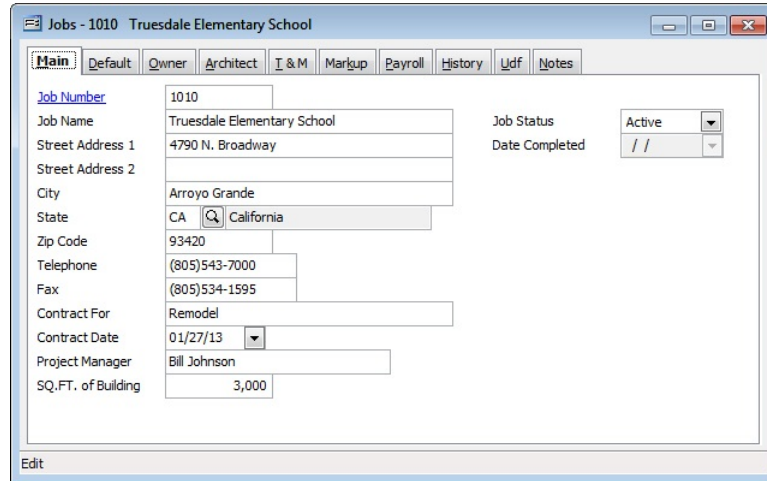
Clicking on the close button will close the screen.


Section 6 – Google Maps®

If the computer on which BIS® with the Document Link & Imaging module license has access to Google Maps® the Mapping icon will be visible on the toolbar.

With a record showing an address on the screen, simply click on the Mapping Toolbar button in BIS® and Google Maps® automatically displays map information from the selected address in BIS®.

Figure: DL-24
Sample record with and address.



Click on the Mapping  icon on the toolbar. If the address cannot be completely identified, a map of the general area will be displayed.

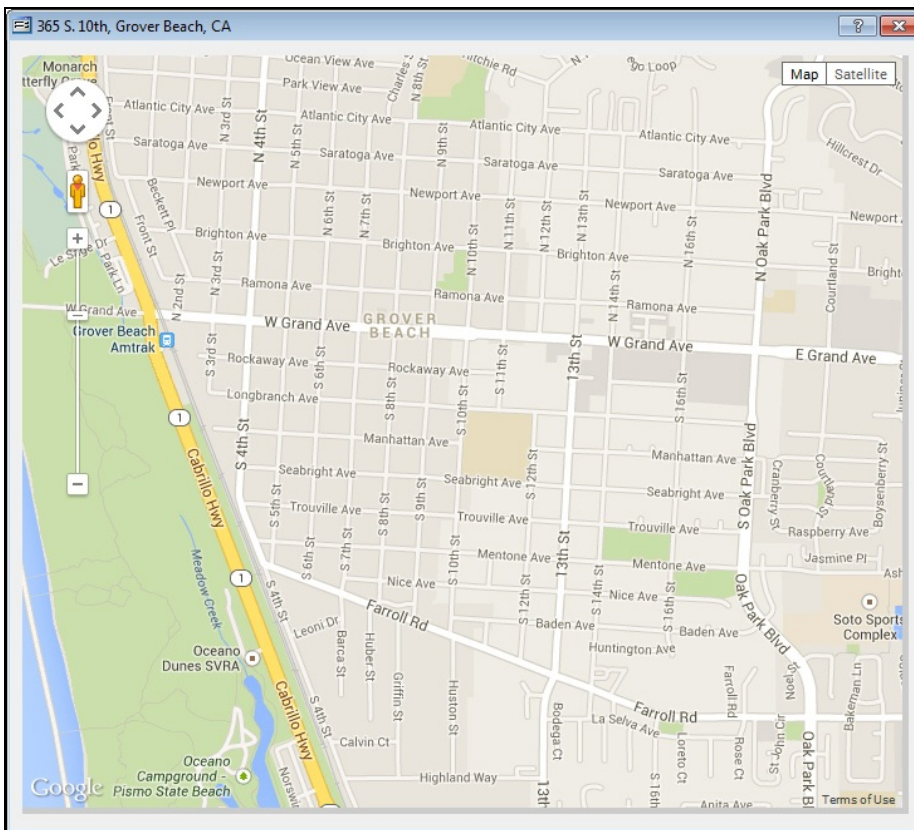


Figure: DL-25 Google Maps® is open with Find sub-screen to assist with locating specific address.

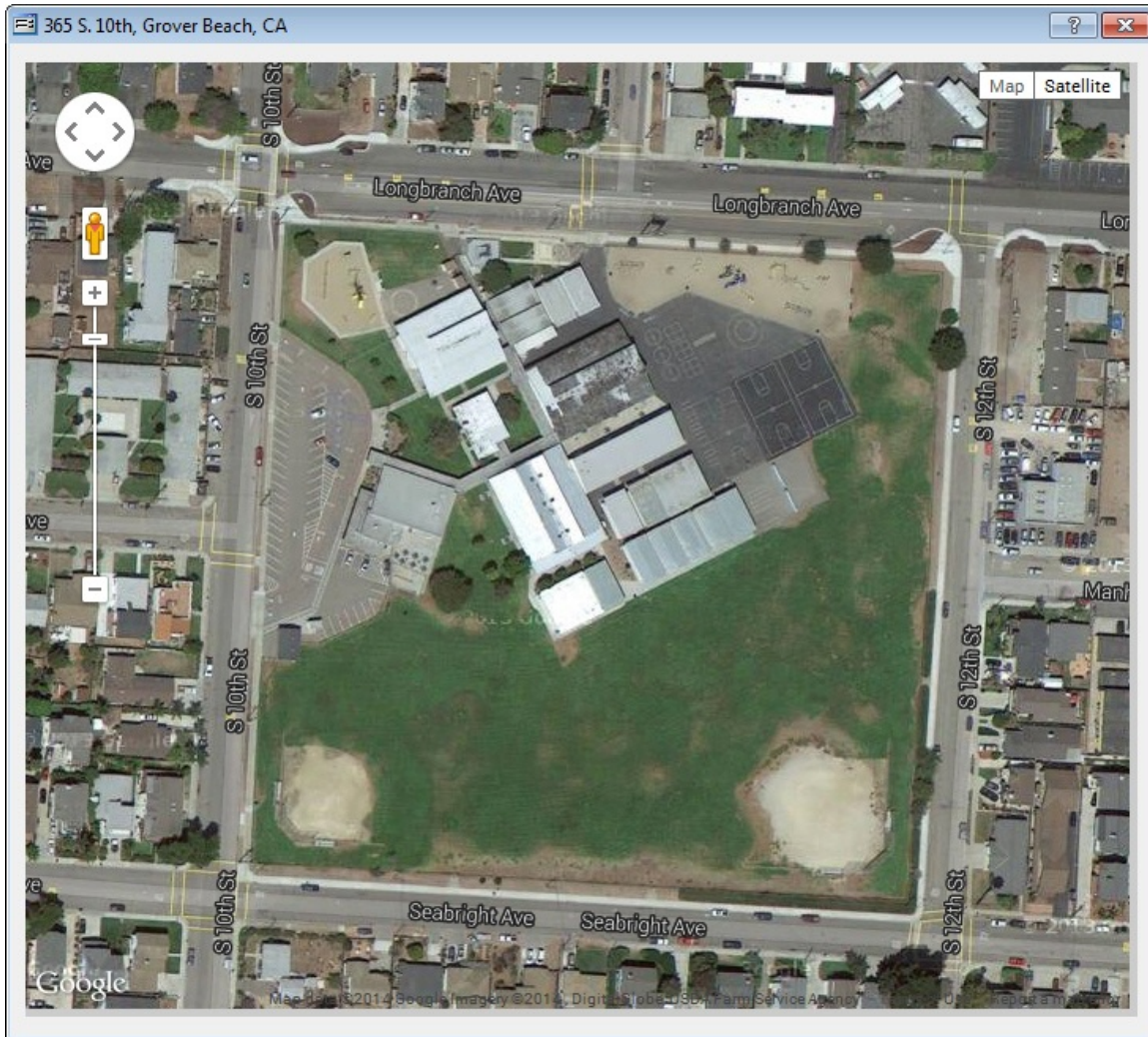


Figure: DL-26 Google Maps® map showing selected location.

Tip Google Maps® can be displayed in Map or Satellite views.

Tip System Wide Parameters includes a setting to allow using Microsoft Map Point®.

Section 7 – Word® Mail Merge


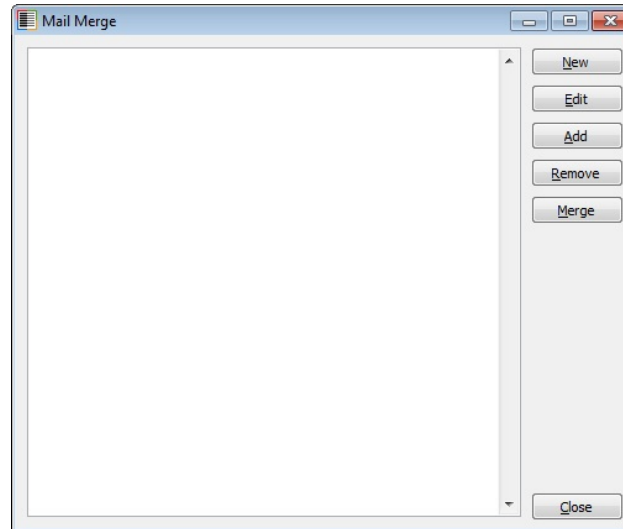
The BIS® Document Link module allows users to create a mail merge from within BIS®. The process can use most existing master record lists already stored in BIS®. Items like bid requests and employee notices can be specifically created for those companies and people. With a master record open, the Word®  icon is available. Clicking on the icon opens the BIS® Mail Merge screen.

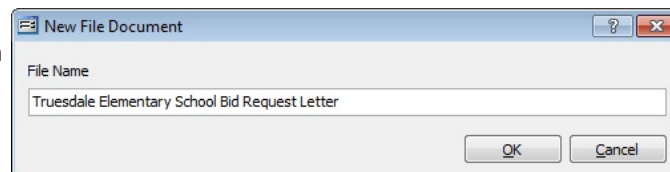
Figure: DL-27
New Mail Merge screen form.



New

Clicking on the New button opens the New File Document window into which the file name is entered.

Figure: DL-28
New File Document screen form into which the file name is entered.



Clicking on the OK button will save the name and open Microsoft® Word®. Clicking on the Cancel button will close the screen without opening Word®.

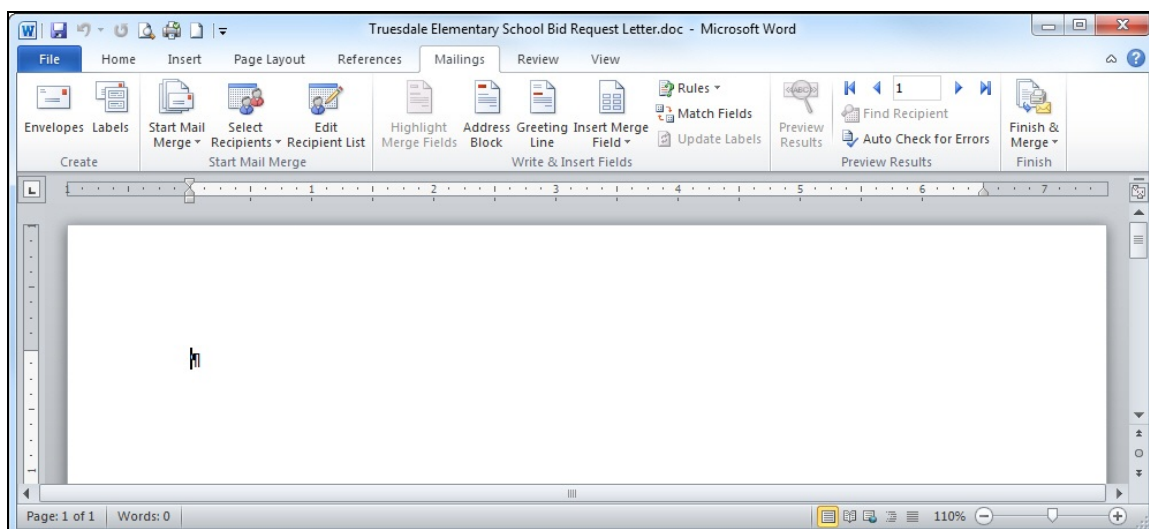


Figure: DL-29 New, blank document opened in Word®.

Create the document in Word®.

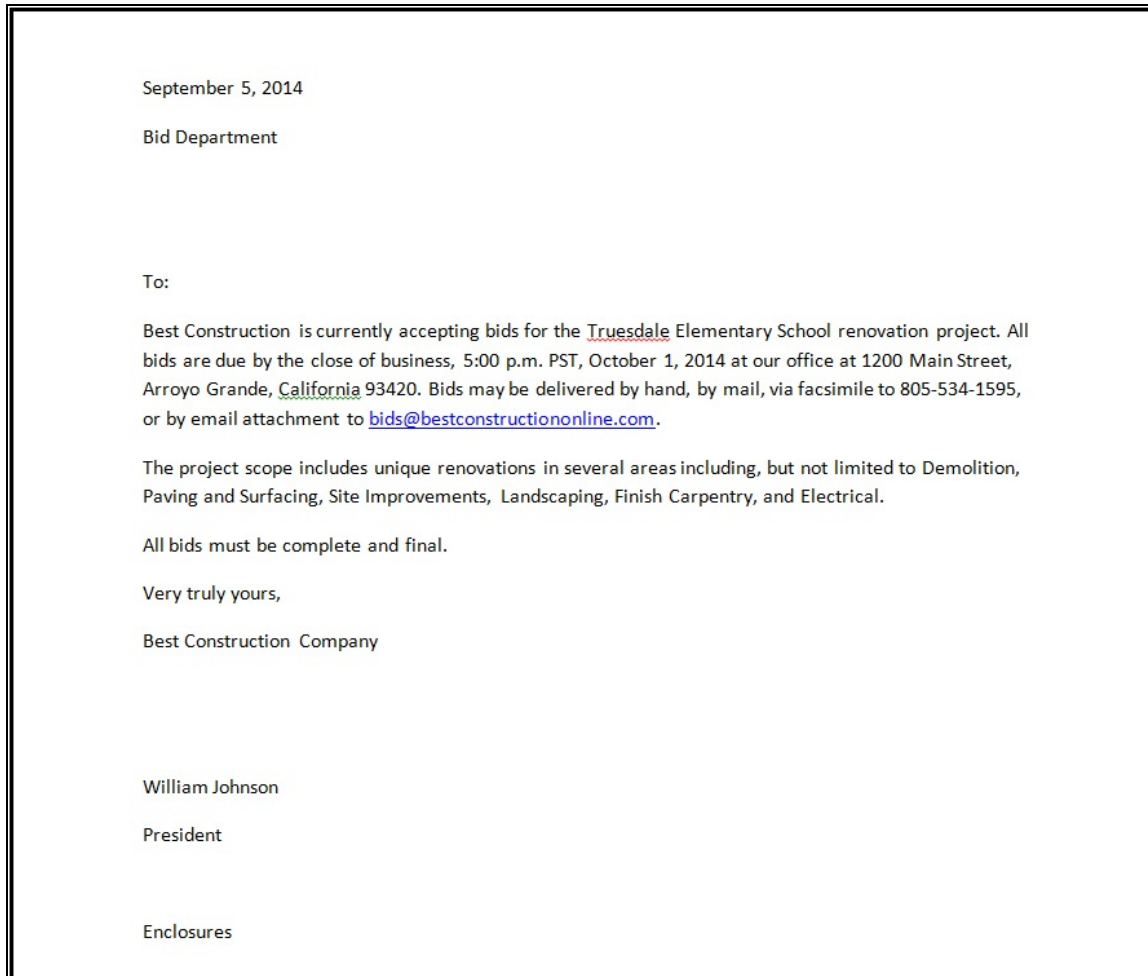



Figure: DL-30 Mail merge document prior to the insertion of the merge fields.

Adding Merge Fields

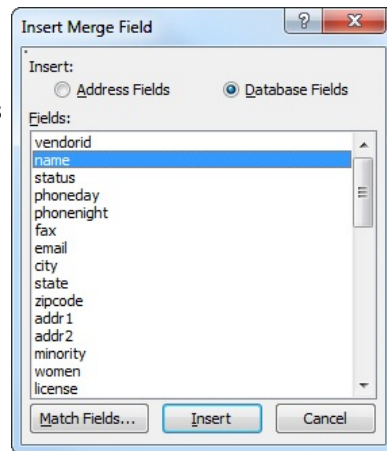
Using the Insert Merge Field  icon in Word®, open the Insert Merge Field window. Two types of fields are available, Address Fields and Database Fields. Use the Database fields only.

Caution

When selecting fields to merge, use ONLY the Database Fields.

Figure: DL-31

Insert Merge Field selection box showing Database Fields. The fields displayed came from the BIS® source file.

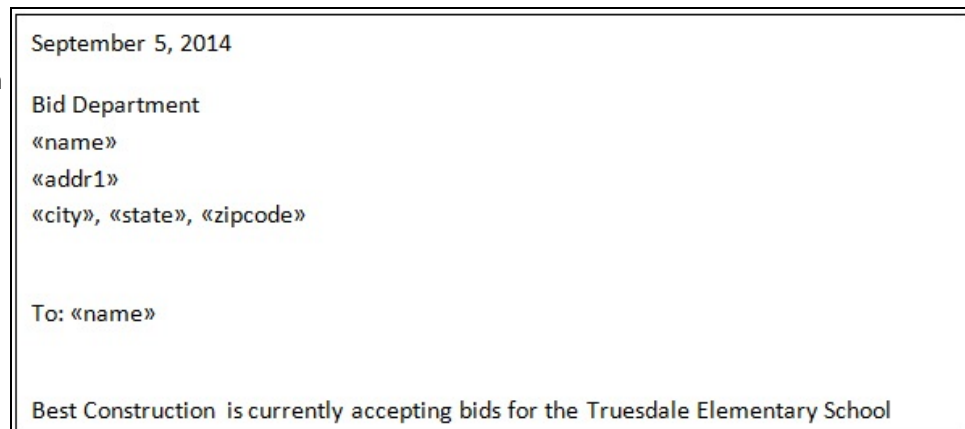


The fields displayed come from the record in BIS®. Those displayed in the example come from the Vendor Master Record.

With the cursor on the correct location in BIS®, select the field(s) needs needed.

Figure: DL-32

BIS® fields added to the template letter from within Word®.



Caution

It is beyond the scope of the manual to discuss all of the features and functions available within the Word® Mail Merge feature. Such functions could include conditional fields, or eliminating lines or spaces if fields in particular documents contain no data.

Save the completed template document in Word®.

Edit

The Edit button is used to open an existing merge document. Select the document from the list, and click on the Edit button. Word® will open the source merge document, and it can be edited as described above.

Add

The Add button is used to add a source document from a list of those available. Once selected, Word[®] will open the added source merge document, and it can be edited as described above.

Remove

The Remove button is used to remove a source document from the list of those available.

Merge

Return to the BIS[®] Mail Merge screen form. With the document highlighted, the merge process will be initiated by clicking on the Merge button. It opens a report-style query screen.

Report Types**Mail Merge**

Only the Mail Merge Report Type is available for the selected master record. For the example, the Vendor File master record information is discussed.

Document

This drop-down list will show all of the previously created merge documents from which to choose the current merge.

Order By

- Vendor Id
- Vendor Id Numeric
- Vendor Name
- Vendor Status
- City
- State
- Zip Code
- Day Telephone
- Cost Code
- Vendor Type

Options

- Active
- Inactive
- Union Vendors
- Non-Union Vendors
- Minority Owned Business Enterprise
- None-MOBE
- Women Owned Business Enterprise
- None-WOBE
- 1099 Vendors
- Non-1099 Vendors
- Case Sensitive

Fields

- Vendor Id
- Vendor Name
- City
- State
- Zip Code
- Day Telephone
- Cost Code
- Vendor Type

Merge Button

Use this button to activate the merge with the filter criteria set in the Query screen. When the button is used, a message will appear that Word[®] is being started. The result will be the merged document.

Close Button

Clicking on the close button will close the screen.

Merged Word® Document

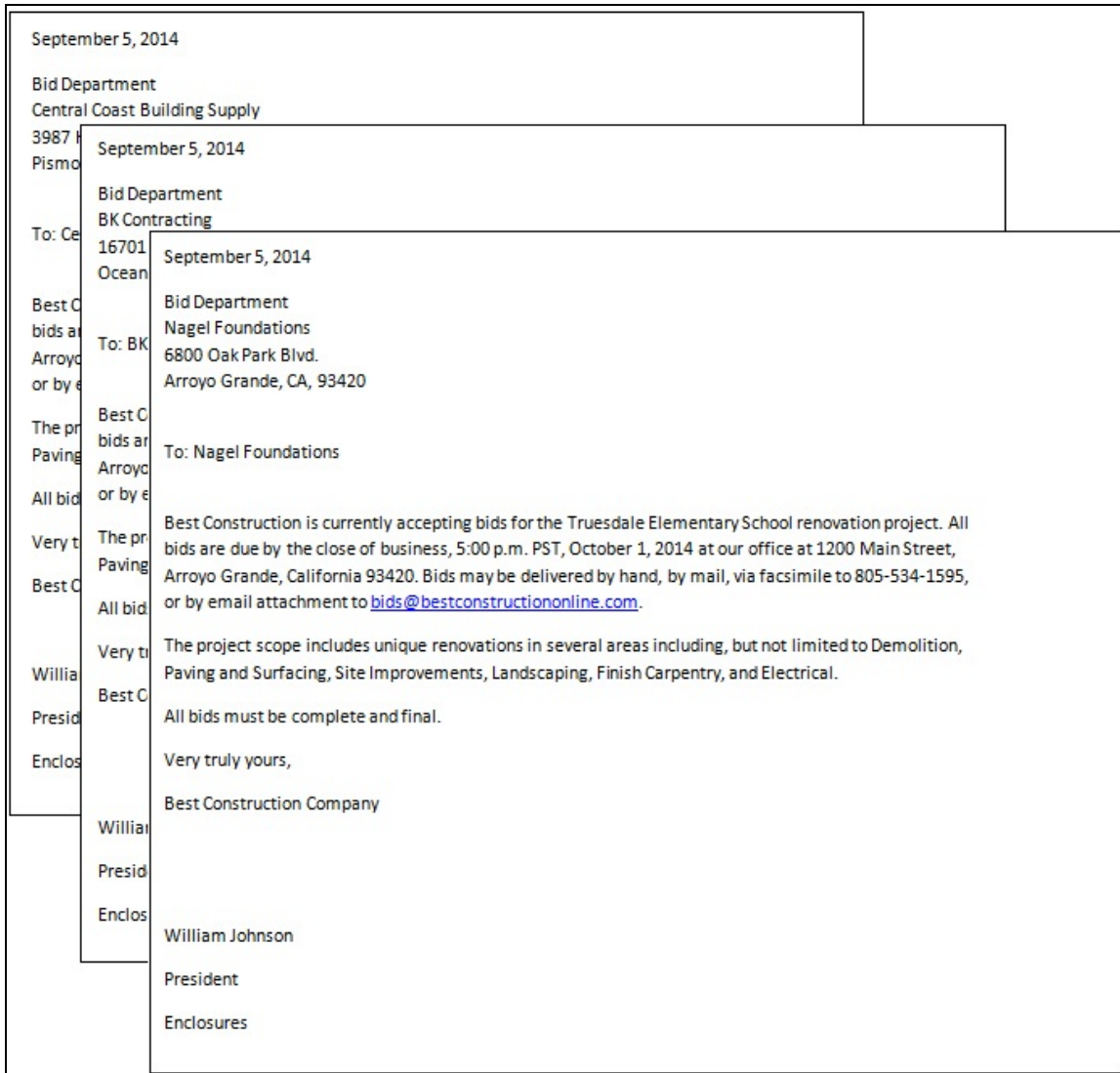


Figure: DL-33 Three of 15 Word® bid request letters merged with selected subcontract vendors.

Section 8 – Excel® Export

The BIS® export to Excel® feature can be a powerful tool in enabling users to use valuable data in other ways in spreadsheets. The feature works from most master records, but not from any transactions.


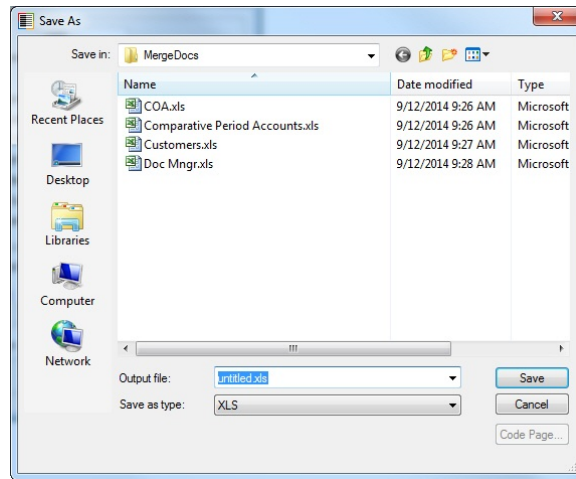
With a master record open, the Excel®  icon is available on the right side of the main toolbar. Depending on the source master record, clicking on the icon opens either of two BIS® export screens. For Chart of Accounts, Comparative Periods, and Document Manager, the Excel® export process opens a simple Save As sub-screen to determine the name and location of the file.

Figure: DL-34
Save As sub-screen used with exporting data from the Chart of Accounts, Comparative Periods, and Document Manager data groups.



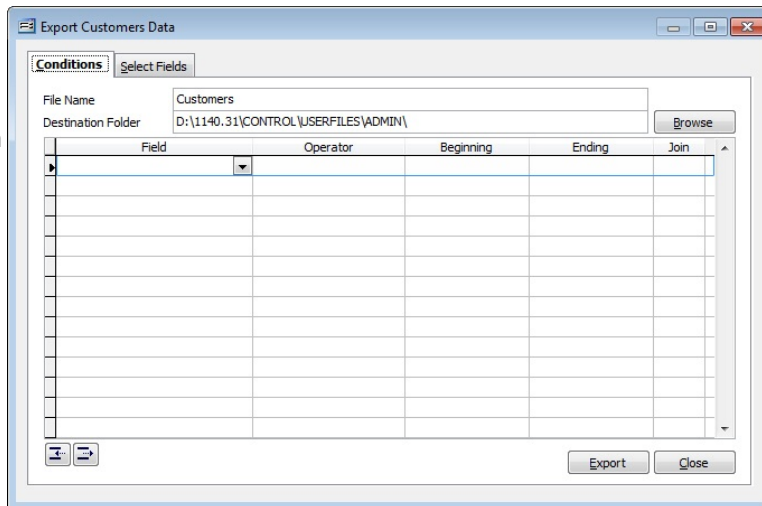
The resulting spreadsheets created for these three data groups will include all available fields.

account	desc	type	jobcost	treeorder	key	parent	title	alignment	dollar	newpage	linebelow	cashflow	right	action	image
1000000000	Assets	Description	N	1_	0_		Total Assets	Center	FALSE	FALSE	None		1	1	0
1001000000	Current Assets	Description	N	2_3	1_		Total Current Assets	Left	FALSE	FALSE	None		1	1	0
1010000000	Cash	Description	N	3_4	3_		Total Cash	Left	FALSE	FALSE	None		1	1	0
1015000000	Petty Cash	Transaction	N	4_5	4_			Left	FALSE	FALSE	None		1	1	0
1020000000	Cash In Bank	Transaction	N	5_6	4_			Left	FALSE	FALSE	None		1	1	0
1030000000	Cash In Bank-Savings	Transaction	N	6_7	4_			Left	FALSE	FALSE	None		1	1	0
1040000000	Cash In Bank-Money Market	Transaction	N	7_8	4_			Left	FALSE	FALSE	None		1	1	0
1100000000	Accounts Receivable	Description	N	8_9	3_		Total Accounts Receivable	Left	FALSE	FALSE	None		1	1	0
1110000000	Accounts Receivable-Trade	Transaction	C	9_10	9_			Left	FALSE	FALSE	None		1	1	0
1120000000	Accounts Receivable-Retention	Transaction	C	10_11	9_			Left	FALSE	FALSE	None		1	1	0
1130000000	Accounts Receivable-Other	Transaction	N	11_12	9_			Left	FALSE	FALSE	None		1	1	0
1140000000	Accounts Receivable Suspense	Transaction	N	12_223	9_			Left	FALSE	FALSE	None		1	1	0

Figure: DL-35 Partial sample Excel® spreadsheet created from the export of the Chart of Accounts.

For all other available data groups, two elements are necessary to export data for an Excel® export: Selection of the fields, and the conditions for the selection of data. Of the two, the selection of the data fields is most important. Without a specific selection of conditions, the program assumes that all conditions are appropriate.

Figure: DL-36
With the Customer master record open, the Excel® Mail Merge button opens the Export Customers Data screen form.

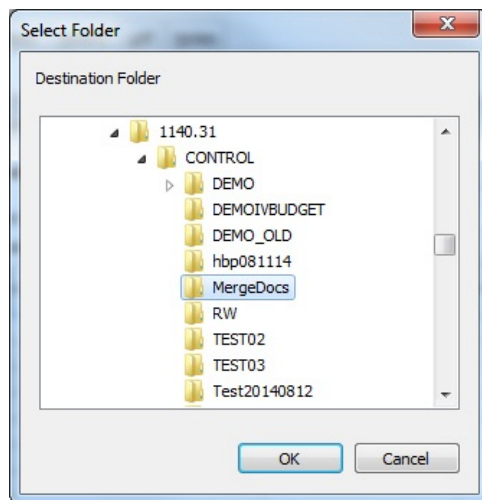


Conditions Tab

The Conditions tab of the Export Customers Data screen form enables the user to identify the conditions applicable to fields used in the selection of the items to be exported. Note that the field conditions do not need to be the same as those selected for export.

If a different Destination Folder is desired, it may be entered manually. Alternatively, clicking on the Browse button will open an Explorer® applet to enable selecting a pre-existing folder.

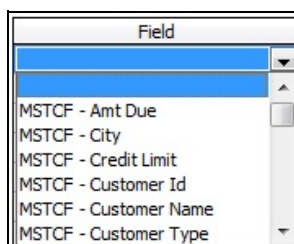
Figure: DL-37
Select Folder applet to choose folder location of exported data.



Field

This column is used to select the field whose conditions need to be set for the selection of data to be exported.

Figure: DL-38
Field drop-down windows showing the field names and descriptions.



Operator

The operator is the logical filter that will be applied to the data selected and applicable to the ranges set in the following columns. In most cases, the following operators will be available:

- (None)
- Equal to
- Between
- Tag
- Less than
- Greater than
- Less than or equal to
- Greater than or equal to
- Not equal to
- Not between

Beginning

The Beginning column is used for entry or selection of the first record in a range of data on which the Operator works. If the Operator refers to a single item, it will be listed here.

Ending

The Ending column is used for entry or selection of the last record in a range of data on which the Operator works. If the Operator refers to a single item, the field will be empty.

Figure: DL-39
Sample Conditions selections of customer data for Export.

Field	Operator	Beginning	Ending	Join
MSTCF - Customer Id	Between	C001	C003	And

Join

The Join column allows two or more fields, and their operators, to act together. The choices are And and Or, and they follow the standard rules of logical operators.



Insert Line

The Insert Line button allows the user to add a Field line above an existing field line in the Conditions tab screen form. The feature can be important especially if Join operators must act in a particular fashion.



Delete Line

The Delete Line button allows the user to remove a Field line highlighted by the cursor in the Conditions tab screen form. The feature can be important especially if Join operators must act in a particular fashion. If a line is to be deleted, the system will ask for confirmation.

Export

Clicking on this button will export the selected data to the destination folder.

Close

Clicking on the close button will close the screen.

Select Items Tab

The Select Items tab of the Export Customers Data screen form enables the user to choose the fields to be exported. Note that the items show both the field name and its description.

Simply click on a box in the Include column to have that data, according to the selection criteria of the Conditions tab, available for export. If fields were previously chosen that should be excluded, click on the box again to remove the checkmark.

Figure: DL-40
Sample Select Items screen form for Customer master record.

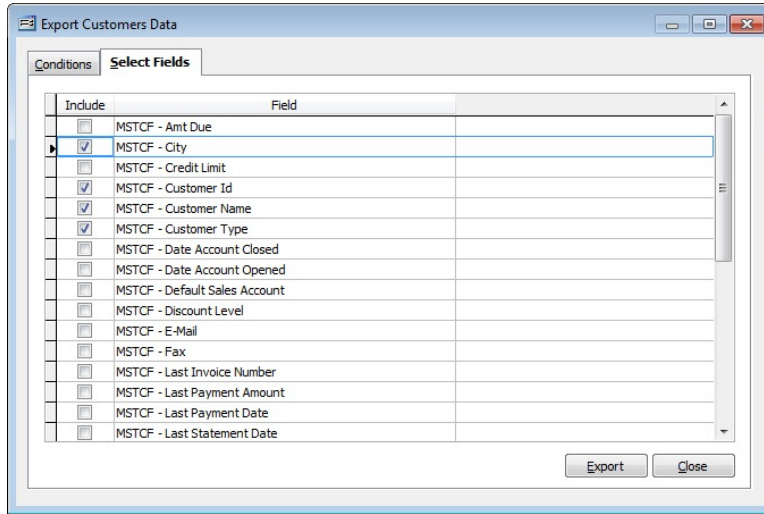
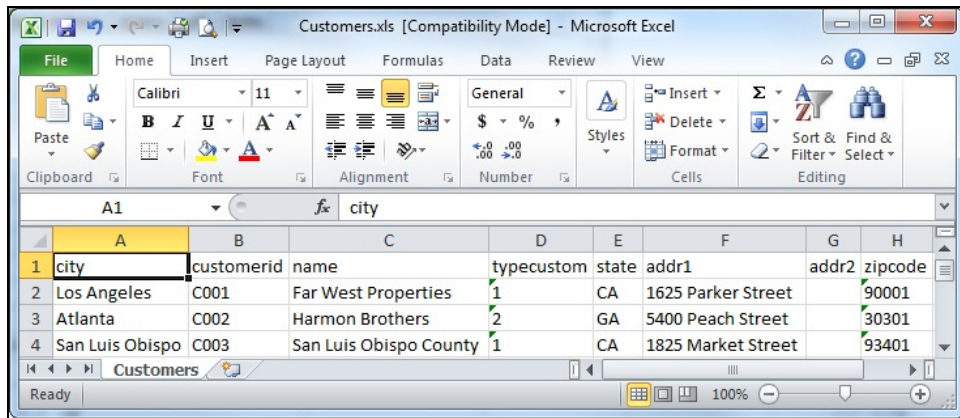


Figure: DL-41
Selected customer data export into an Excel® spreadsheet.



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