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## Integrated Job Costing Systems and the Incorporation of Document Management

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Electronic files and documents are an integral part to project management. It is therefore no wonder that project managers, when interviewed about workplace frustration, often quote a lack of access to project related files or difficulties in tracking those files as the most annoying experiences and a big contributor to wasted time.

Integrated project management systems that offer users assistance with the accessibility of documents will therefore be a valued tool in the project managers' daily work.

Having a job costing and accounting system that is used to create outgoing correspondence from the business such a purchase orders, quotations or sales invoices will make it very easy for the user at any point in time to look at or reprint such integrated documents. Although it may appear that those documents are saved as such, most software systems will not actually save a document file, but will save the details of the content and regenerate it when redisplaying. Looking at the example of an AR invoice the database will hold the invoice date, narrative and price as well as the client key and when it is called up again, fill those details including address details from the client record into the correct layout format to redisplay it. This way the database doesn't get filled up with redundant code, as it would be if the document had been saved as a formatted text document or graphic, because even blank parts of a graphic take up data space. As a result all the information regarding documents that were created by the integrated job costing software are stored in a tidy and data-effective way as part of the data base.

There will on the other hand be external documents that are related to projects, but not generated by the project management software. Examples might be letters written in a word processing software, spreadsheets created in spreadsheet software, creative work such as video, audio or graphic files or PDF copies of scanned correspondence from outside of the business.

What is the best way to make this kind of information accessible via the job costing system?

One solution that might come to mind initially would be to integrate those files into the project management database. Take a job in the job-costing database and attach a spreadsheet to it in the same way as some widely used email clients save copies of attachments in the email software. Technically this would be a relatively easy-to-undertake option serving the purpose. It would nevertheless not be a data-storage effective solution, as it would create an additional copy of the original file thus increasing the amount of data held. It would also not be ideal with regard to the reliability of the linked document because the copy in the database would not be updated with the original file. Users may test this if they - for example - attach a word file to an entourage email and then change the original word document prior to sending the email from the outbox. The latest updates of the document won't be part of the attached copy.

So, increase of data volume and lack of authenticity: Two major disadvantages of this prima facie simple solution.

A better solution is offered by some systems that, rather than taking copies of the original files, link their location on the server to the project in the job costing software. Every job has a path to it's folder on the server saved with it and when looking at the job in the job costing system,

this folder is visible and contained documents can be opened on a double-click of a button. This way both the authenticity of the original is guaranteed, as there is only one original file involved and updated plus the data space required is kept to a minimum. The document can be accessed from within the job costing system and information is always readily available saving everybody time and reducing work frustration.

© 2008 Volker Bendel - Volker Bendel is manager of the training department of Agency Software Worldwide, the producers of the "Paprika/Rebus" job costing software - <http://www.paprika-software.com>

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