

# D. MILLER ASSOCIATES

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Newsletter

## WORKFLOW MANAGEMENT USING STARBUILDER AND CHAMELEON

Although StarBuilder has brought significant productivity and reporting improvements to the accounting department, and enabled better cost control through its StarProject and Job Costing modules, workflow has continued to be a largely manual and paper-dependent process. Employees rely on original and copies of Accounts Payable invoices, with varying degrees of tracking and control exercised until the invoice is actually entered into the StarBuilder system.

With the introduction of Chameleon for StarBuilder, however, StarBuilder users now have a significant opportunity to improve the productivity and profitability of their operation. Invoices can be electronically scanned, tracked, routed, managed, and approved inside Chameleon, and then automatically brought into StarBuilder. Managers have information on the status of every invoice at their fingertips, resulting in improved cash flow, improved cost management, and easier access to important information for quicker and more accurate billing.

The actual processes involved in using Chameleon with StarBuilder may vary by company. What follows, however, is an example of how Chameleon is used in the office of a \$25M local subcontractor who relies on StarBuilder and Chameleon to minimize their reliance on people and paper, and maximize their use of technology.

Invoices are initially scanned by the front desk person, who then "routes" (an electronic process similar to sending an email) the invoices to the appropriate individual. Often this individual is the Project Manager, easily identified by the Job Number on the invoice. Many invoices are simply routed to "Accounting," however, so that someone in the accounting department can

determine the job information and route it to the appropriate individual, or simply index and approve the invoice for importing into StarBuilder.

Once the invoice has been scanned and saved inside Chameleon, team members then use the routing, notes and email functionality inside Chameleon to manage the workflow. Key to these processes is the "Approve and Route Again" function inside Chameleon, which allows the invoices to be routed multiple times, but maintains the status of the invoices as "Waiting (Approval)."

Marilyn, who is in charge of the accounting department, can view the "work list" and invoice routing reports at any time, so she always knows the last person to "touch" the document, and when the last time the document was routed or had its status changed. When a project manager or other individual has approved the invoice for either full or partial payment, the invoice is routed to Marilyn, where it shows up in her work list.

Marilyn has the ability to review the invoices and the coding, and then approves them inside Chameleon. Any invoices that were approved and routed to Marilyn, but not approved *by* Marilyn, stay in her inbox with a status of "Waiting," and are not imported into StarBuilder. No one else has the ability to alter the invoices inside Marilyn's inbox; if for some reason they want to recall the invoice for additional research, Marilyn can route it back to the individual for further research.

The productivity improvements Chameleon offers are tremendous, and easy to achieve. If you'd like more information on Chameleon, please call (301) 261-5989, or email [Info@DMillerAssociates.com](mailto:Info@DMillerAssociates.com).

## STARBUILDER SERVICE PACK, UPDATES AVAILABLE FOR DOWNLOAD

The most recent Service Pack for StarBuilder, 6.0.71, is now available for download at the AMSI Customer Service Site. Among other changes, the Service Pack incorporates changes to Federal Payroll Tax Rates mandated by the 2009 Economic Stimulus Package, resulting in increases in net pay for most employees.

GEMM Version 9.1.1, which has been updated to meet 2009 Federal Reporting requirements, is also available for download now. Service Pack 2 for Chameleon is in testing, and should soon be available for download.

We recommend creating a folder on your Server called (e.g.) SOFTWARE\_UPDATES and, when downloading an update, selecting SAVE instead of OPEN, and then saving the update package in this folder. If you need to install StarBuilder on a new workstation, you can load StarBuilder from the 6.0 CD (released in October of last year) and then run the update from the SOFTWARE\_UPDATES folder on the Server. Note that 6.0.71 is cumulative; i.e., you can install it directly after installing 6.0 from the CD without the year-end and other updates that were released since Version 6.0.

## CHAMELEON “LUNCH AND LEARN”

On Wednesday April 22, D. Miller Associates will be sponsoring another Chameleon “Lunch and Learn” opportunity from 11:00 to 2:00 p.m. in our Deale, MD office. You’ll see Chameleon used in a StarBuilder environment, and obtain hands-on experience indexing, routing and searching using the Chameleon software. We’ll also review the new enhancements to Chameleon with a CIS representative, and discuss processes and implementation options. There is no cost for this seminar, and lunch will be provided, but space is limited, so please call (301) 261-5989 to register or for additional information.

## UPCOMING CLASSES

On Tuesday May 12, D. Miller Associates will hold a “Mastering StarProject” class from 9:00 a.m. to 4:00 p.m. in our Deale, MD office. StarProject users will receive hands-on training in cost analysis and reporting; documents; using StarProject with other programs; etc. The cost of the course is \$299.00, and includes lunch.

If you have four or more employees, and are interested in training opportunities customized for your business, we can provide your company with professional instruction in a variety of applications. We can create a curriculum customized for your company in the use of software like Excel, Word, StarBuilder, and other programs. Please call (301) 261-5989 if you’d like to discuss your company’s unique training requirements, or email [Classes@DMillerAssociates.com](mailto:Classes@DMillerAssociates.com).

## 2009 CLIENT CONFERENCE

The 2009 AMSI Client Conference will be held this year in Orlando, FL, from Sunday September 27 through Wednesday September 30. This conference promises to be full of new and innovative classes and educational opportunities, as well as specific educational tracks for each of the AMSI products, and in-depth question/answer sessions with product experts and users. We’re actively soliciting ideas for educational sessions, so if you have any suggestions, please email them to [Classes@DMillerassociates.com](mailto:Classes@DMillerassociates.com).

### About Us

D. Miller Associates has been providing computer hardware, software and services to construction-related businesses for 25 years. Call 1-800-895-1698 for more information.

