simova
think outside the box

DMS | DOCUMENT MANAGEMENT SYSTEM

Fast digital archiving of documents - seamlessly
integrated into your NAV business solution

DMS FROM SIMOVA FOR A PAPERLESS OFFICE

E-mails, newsletters, inquiries, offers, invoices - countless documents arrive in your office every day. To get the paper chaos under control, many entrepreneurs prefer to digitize their documents and processes today rather than tomorrow. However, the desire for digitisation is often countered by scepticism and uncertainty. „How do I best proceed?" or „How do I know which solution is the right one for me?" are just two of the many questions that are repeatedly asked in this context.

In many companies, for example, the mountains of paper still pile up on the desks and archives take up more and more space as a company grows older. As a result, the search for certain documents often takes a lot of time and customers, colleagues and employees are annoyed.

By using a document management system (DMS), access to documents can be facilitated and significantly accelerated. Documents are stored in digital form in an orderly manner and can be accessed via Metadata (descriptive keywords) optimized for a quick search. Documents can be accessed directly from Microsoft Dynamics NAV.

The seamless integration into Microsoft Dynamics NAV allows you to work as usual with your familiar user interface and at the same time can benefit from all the advantages of a document management system.

Automatic electronic archiving of documents saves you time and money.

YOU CHOOSE YOUR FORM OF DATA STORAGE

For the direct connection to Microsoft SharePoint, which we use as a document repository, you can choose between different implementation variants according to your requirements and needs. In addition to the cloud and on-premise implementation, we provide you with a hosted DMS solution as a service.

Local Netzwork

ON-PREMISE
In the classic variation, the on-premise solution, our DMS is implemented directly into your IT infrastructure. In this way, you can adapt existing Microsoft SharePoint installations and thus generate synergies with existing solutions. Whether virtual or physical server systems, the implementation of the On-Premise DMS solution is simple and flexible. Due to a high scalability, small to very large solutions can be mapped.

SYSTEM REQUIREMENTS

The integration of our DMS into your NAV-based ERP system is fast and uncomplicated. The only prerequisite for integrating the Simova DMS is that your ERP system is based on Microsoft Dynamics NAV 2013 or a more recent version.

Local Network

CLOUD

CLOUD
DMS from Simova connects your Microsoft Dynamics NAV with the cloud solution Microsoft SharePoint Online or a SharePoint in Microsoft O365. The transition to a modern cloud solution allows you to access your data from any location and adapt your DMS to your specific requirements and resources at any time.*

*Please note that the Cloud DMS solution is not yet an audit-proof solution.

ADVANTAGES FOR MANAGEMENT

With our DMS, your documents are digitally managed and centrally stored. The tedious search for information will be a thing of the past thanks to structured, transaction-based filing.

As an interface between the NAV and SharePoint products from Microsoft, DMS from Simova guarantees maximum compatibility and the future security of your investment.

Your employees work with their familiar user interface, so that the training effort is reduced to a minimum and high user acceptance and a successful introduction of the DMS can be guaranteed. In addition, the Simova DMS features a flexible architecture and can be individually adapted according to requirements and expanded with various modules, for example an audit-proof archive system. Save money on expensive premises, shelves and folders. Your initial investment for digital archiving pays for itself with the operating time and enables you to save time and space through simple document access, which enables a quick return on investment.

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- Low training effort and high user acceptance
- Future-proof investment
- Individually adaptable and expandable
  (e.g. to a revision-proof solution)

ADVANTAGES FOR EMPLOYEES

Are you the type of employee who stores the majority of documents on your desktop's local hard drive?
But what happens when you're on vacation or absent due to illness and your colleagues have to search your filing structure for a long time to find an important document?
With DMS, all required documents are managed centrally, so that you and your colleagues can access the most important information quickly and without a long search.

Thanks to the seamless integration with Microsoft Dynamics NAV, our DMS also offers the advantage that you can work with your familiar user interface.

Furthermore, through the direct connection to Microsoft SharePoint, Office documents (Word, Excel, PowerPoint, e-mails) can be edited directly from NAV, saved as a new version and provided with corresponding comments. Thus it remains traceable at any time who is doing what and when in which document.

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- Smooth processes even during vacation or illness
  thanks to central management of information
- Familiar user interface
- Edit Office documents directly from NAV
- Versioning for more transparency

ADVANTAGES FOR FINANCIAL ACCOUNTING

As a financial accountant, you always have an overview of all payment-based transactions in your company. Without digital document management, however, this task can hardly be accomplished with the large number of invoices and the search for documents can quickly become a torture.
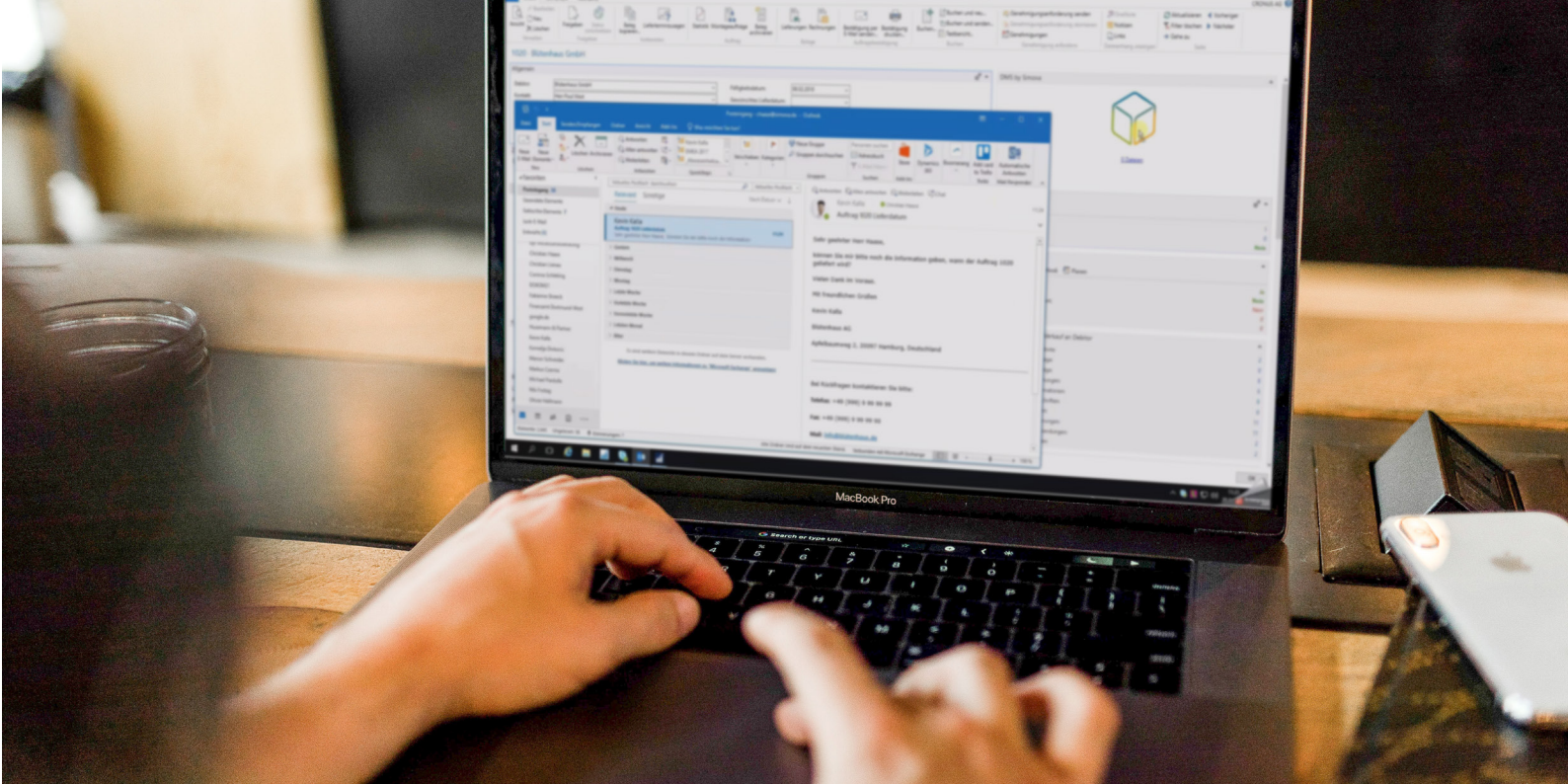
DMS from Simova supports you in the digital management and archiving of documents of all kinds. Documents generated by the system such as quotations, orders, purchase orders and invoices are automatically archived during booking or printing and supplemented with metadata (keywords) for a quick search. External documents (e.g. order confirmations) can be conveniently and quickly transferred to the archive via drag & drop and also provided with metadata. This means that all documents archived for a process are available for display at all points in the process. Always at hand - without tedious searches.

Thanks to the flexible architecture, our DMS can easily be expanded with additional modules such as a comprehensive solution for incoming invoice processing with Document Capture or an audit-proof archiving system with the ecspand solution.

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- Digital management and archiving of all Transaction-related documents and records
- Metadata for fast and convenient searches
- Possibility of extending incoming invoice processing to an audit-proof solution

ADVANTAGES FOR PURCHASE AND SALE

Supplier declarations, quotations, orders, purchase orders, invoices - in purchasing and sales you receive a large number of documents every day. Keeping an overview can quickly become a daunting task.

With DMS, all documents are assigned to the corresponding projects, creditors, debtors, etc. in such a way that you can find the documents in a matter of seconds and trace the correspondence at any time.

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- Structured assignment of documents makes it easier to find information
- Versioning makes the history of documents traceable
- Automatic return of documents by using barcode scenarios

To further optimize your work processes, our DMS offers you a number of additional features, such as versioning or integration of barcode processes. Thanks to versioning, the history of documents is preserved so that changes to contracts or quotations can be traced at any time. The integration of barcode processes enables you to return non-digital documents to the system.

Think, for example, of delivery notes or order confirmations that you want to automatically store in Microsoft Dynamics NAV after they have been signed or edited by hand. This is possible via a barcode on the respective document and a document scanner or multifunction device.

FEATURES AT A GLANCE

Drag & Drop
Easy filing of all kinds of documents via drag & drop. During filing, the document type is defined and metadata is adjusted if necessary.

Quickdrop
Regular document types, such as photos or e-mails, can be stored more quickly using the Quick Store function. It is not necessary to select a document type.

Individual definition of metadata
Metadata is the relevant information that is given to each document when it is stored in Microsoft Dynamics NAV. These can be individually defined and supplemented by a free text.

Barcode processes
If documents are to be stored in Microsoft Dynamics NAV again after they have been signed or edited by hand, this is automatically possible via a barcode.

Double printing
Double printing enables documents (e.g. quotations, invoices) to be stored automatically when they are printed or sent via e-mail from NAV.

Preview function
If, for example, you are in an offer or order, you can view the associated documents and all other process-related documents directly.

Document basket function
In the document overview, stored documents can be added to a document basket and saved as a zip package or sent directly by e-mail.

Versioning
If documents are stored several times, a new version is created, which can then be looked up in the document overview. The history of a document thus remains traceable.

Sort and filter function
In the document overview of Simova DMS, documents can be sorted according to criteria such as year, document type, version or user. You can search in the individual columns using direct input and set filter options.

Transparent archiving
Documents are automatically stored in the course of business processes. For example, documents stored on a quotation are included in the process and are also available on the order during conversion.

Setup of inbound lists
Incoming lists can be filled e.g. by e-mail or folders on the file server. From there, you can assign documents to an order.