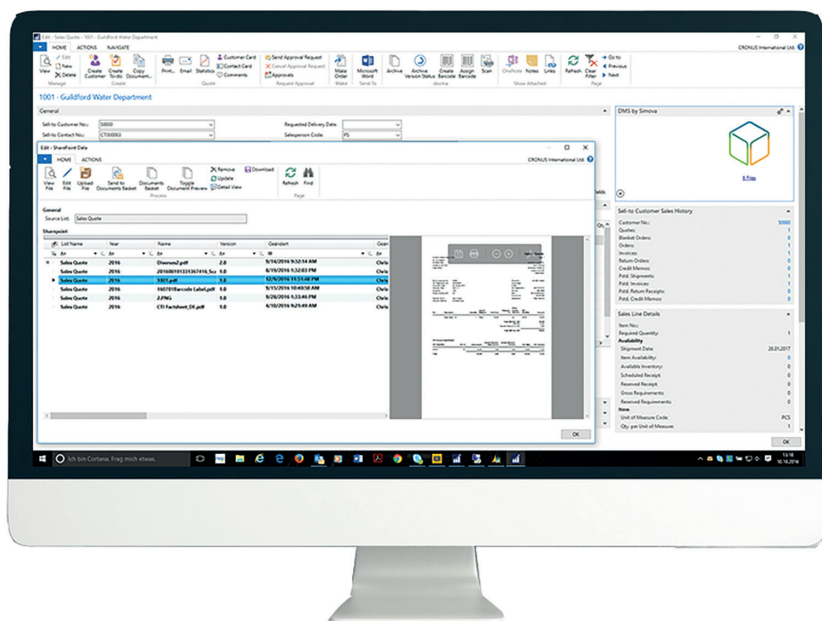




# DMS – Document Management System

For your Microsoft Dynamics NAV-based  
industry software



*"With our DMS, we are offering our customers a powerful tool for Microsoft Dynamics NAV, with which you can store and view documents in an easy, quick, and straightforward way."*

Christian Haase, CEO  
Simova GmbH

## ON THE WAY TO A PAPERLESS OFFICE WITH THE DMS BY SIMOVA

Emails, newsletters, queries, offers, invoices – countless documents are fluttering around your office every day. In order to master the chaotic paperwork, many business owners would rather digitalise their documents and processes sooner rather than later. The desire to digitalise is however still sometimes met with scepticism and unease. "Where do I start?" and "How can I know which solution is right for me?" are but two of numerous questions that always come up in this context.

So, the mountain of paperwork on desks is as present as it ever was in many offices, and as time goes on, a company's archives continue to take up more and more space. The result: searching for certain documents often takes up a lot of time, which can be a source of irritation for customers, colleagues, and employees.

By implementing a **Document Management System (DMS)**, you can facilitate and significantly speed up access to documents. Documents are organised and stored in digital form and can be optimised for quick searches using metadata (descriptive keywords).

Accessing the documents takes place directly out of Microsoft Dynamics NAV.

Thanks to the seamless integration into Microsoft Dynamics NAV, you can work as usual **using the interface you are familiar with**, while at the same time enjoying all of the benefits of a Document Management System.

### System Requirements

Integrating our DMS into your NAV-based ERP system can be done in a quick and straightforward way. One of the requirements for integrating the DMS from Simova, is that your ERP system is based on **Microsoft Dynamics NAV 2013** or a newer version. <sup>\*)</sup>

<sup>\*)</sup> Integrating into older versions of Microsoft Dynamics NAV is also possible, but requires a little more work. Feel free to contact us – we would be happy to advise you on the options for implementation.

# YOU DECIDE HOW YOUR DATA IS STORED

You can choose between different implementation options for the direct connection to Microsoft SharePoint, which we use for document storage, according to your needs and requirements. In addition to cloud-based and on-premise implementation, we can also offer you a hosted DMS solution as a service.



Lokales Netzwerk



CLOUD



Rechenzentrum

## ON-PREMISE

With the classic option, the on-premise solution, our DMS is implemented directly within your own IT infrastructure. In this way, you can adapt existing Microsoft SharePoint installations, and therefore create synergy with the solutions already in place. Regardless of whether you have virtual or physical server systems, the implementation of the on-premise DMS solution is simple and flexible. High scalability allows for the creation of small to extremely large solutions.

## CLOUD

DMS from Simova connects your Microsoft Dynamics NAV with the cloud solution, Microsoft SharePoint, or with SharePoint as part of Microsoft Office 365. Switching to a modern cloud-based solution allows you to access your data from any location and adjust your DMS at any time in accordance with specific requirements and resources.<sup>\*)</sup>

## HOSTED

Are you looking for a DMS solution that can be connected to your Microsoft Dynamics NAV quickly and easily, but are concerned about the data security of solutions offered online? Would you also prefer to concentrate on daily business rather than on your archive? If so, then the Hosted DMS solution is the right choice for you. It offers you all of the functionality of an on-premise DMS solution, but doesn't require an in-house IT infrastructure. Just like with the cloud-based solution, you can access your data from any location. The Hosted DMS solution offers a secured connection (SSL) to a data centre located in Germany. Our data hosting partner enforces the highest standards of security in their data centre and offers an SLA of 99.9% availability.

<sup>\*)</sup> Please note that the cloud-based DMS solution is not yet revision-proof at this time.



## BENEFITS FOR MANAGEMENT

In management, you face the same challenge every day: keeping your company's competitive, and making decisions to ensure this. A Document Management System can help you with this.

With our DMS system, your documents are managed digitally and stored centrally. The long-winded search for information will soon be a thing of the past, thanks to the structured, process-related storage.

As an interface between Microsoft's NAV and Share-Point products, the DMS from Simova guarantees the highest level of compatibility and longevity for your investment.

Your employees work with their usual user interface, and, as such, the required training is minimal and you can ensure a high level of user acceptance and a successful introduction of the DMS. Additionally, the DMS from Simova stands out thanks to its flexible architecture and can be customised to meet individual requirements, and can be expanded to include various other components, e.g. to become a revision-proof

archiving system. You can save money on expensive storage spaces, shelving and filing cabinets. Your initial investment in a digital archive can be recouped thanks to the long operational life, and allows you to save time and space with easy document access, which also makes a quick return on investment possible.

### Your highlights

- Quick return on investment thanks to easy access to documents
- Minimal training requirements and high user acceptance
- Future-safe investment
- Can be individually adjusted and expanded (e.g. to become a revision-proof solution)





## BENEFITS FOR EMPLOYEES

Are you one of the many employees who still save documents on your local hard drive? In worse cases, you might still print out all documents and store them in your desk drawers. Doesn't seem very problematic, does it?

This may be acceptable for a while, but we all know how quickly the documents stored in your computer or desk can transform into absolute chaos. And what will happen if you are off sick or on holiday, and your colleagues need to spend a long time searching for documents vital to business processes, which are filed away in your storage system?

With a DMS, [all necessary documents are managed centrally](#), so that you and your colleagues have access to the most important information quickly and without having to spend a long time searching for it.

Thanks to the seamless integration into Microsoft Dynamics NAV, our DMS offers the additional advantage of being able to [keep the user interface you're accustomed to](#).

Furthermore, [Office documents](#) (Word, Excel, PowerPoint, emails) [can be edited directly from NAV](#), saved as new versions and commented, thanks to the direct connection to Microsoft SharePoint. As such, you always have an overview of who edited which document, when they edited it, and why.

### Your highlights

- Smooth processes, even when you off sick or on holiday, thanks to the centralised information management
- Familiar user interface
- Edit Office documents directly from NAV
- Increased transparency and traceability thanks to versioning



## BENEFITS FOR ACCOUNTING

As an accountant, you always keep an eye on all number-based processes within your company, provide well-ordered and comprehensive documentation, and are responsible for checking invoices. Without a digital document management system, this task can often be insurmountable with the multitude of invoices you are responsible for, and searching for receipts in your offices can quickly become torturous. You can avoid all of this by using a DMS.

The DMS from Simova supports you in the **digital management and archiving** of all kinds of documents. Receipts generated by the system, such as for offers, jobs, orders and invoices, are automatically archived when booked or printed out, and are supplemented with **metadata (keywords)** so that they **can be found quickly**. External documents (e.g. job or order confirmations) can be quickly and easily transferred to the archive by drag & drop, and are also assigned metadata. As such all archived documents from any stage related to a process are available in one place and can be easily displayed. Always at hand – without any tedious searching.

Due to its flexible architecture, our DMS can be easily expanded to include other components, such as a **comprehensive solution** for the management of incoming invoices with **Document Capture**, or a **revision-proof archiving system** with the **ecspand** solution.

### Your highlights

- Digital management and archiving of all process-related documents and receipts
- Search for receipts quickly and easily using metadata
- Option to expand an incoming invoice management system to a revision-proof solution





## BENEFITS FOR FINANCIAL BOOKKEEPING

Delivery notes, offers, jobs, orders, invoices – in both Purchasing and Sales, you receive a plethora of documents every day. Keeping an overview of all of these documents can quickly become a gargantuan task.

With a DMS, all receipts for the relevant projects, creditors, debtors, etc. are organised so that the documents can be found within seconds, and the correspondence can be traced at any time.

To further optimise your workflows, our DMS also offers a range of additional features, such as versioning or incorporation of barcode processes. The document history is retained due to versioning, so that changes made to contracts or offers can be traced at any time. The incorporation of barcode processes allows you to make non-digital documents available within the system.

For example, think about the delivery notes or job confirmations that you would like to automatically feed into

Microsoft Dynamics NAV once they have been signed or edited by hand. A barcode on the relevant document and a document scanner or multifunctional device make this possible.

### Your highlights

- Structured organisation of documents relating to projects, creditors and debtors makes finding information easier
- Document history can be traced thanks to versioning
- Automatic return of receipts using barcodes

# OVERVIEW OF FEATURES

## ■ Drag & Drop

Easy upload of all types of documents by drag & drop. While uploading, the document type is determined and metadata is also assigned to it.

## ■ Quickdrop

Document types that regularly occur, such as photos or emails, can be uploaded more quickly using a quickdrop function. Selecting the document types is not necessary.

## ■ Individual definitions of metadata

Metadata is the information relevant to each document, which is included when uploading the documents to Microsoft Dynamics NAV. It can be defined individually and expanded upon using free text.

## ■ Barcode processes

If documents should be reuploaded to Microsoft Dynamics NAV after they have been signed or edited by hand, it is possible to have this done automatically using a barcode.

## ■ Duplicate printing

Duplicate printing enables the automatic upload of receipts (e.g. for offers, invoices) when they are printed out or sent via email from NAV.

## ■ Preview function

If you are viewing an offer or a job, for example, you can preview all of the related documents and all documents relevant to the process.

## ■ Document cart function

Uploaded documents can be added to a document cart from the document overview and saved as a Zip package or dispatched directly by email.

## ■ Versioning

If the same document is uploaded more than once, a new version is created, which can be accessed from the document overview. This allows the history of a document to be traced.

## ■ Sort and filter function

In the document overview in the DMS from Simova, documents can be sorted based on certain parameters, such as year, document type, version or user. In some fields, you can search directly using text entry, and the results can also be filtered.

## ■ Transparent archiving

Documents are automatically uploaded in the course of business processes. As such, all documents uploaded for an offer are entered into the process and are also available when viewing the job after being converted.

## ■ Setup of inbox lists

Inbox lists can be populated by email or from folders on the file server, for example. From there, you have the option to assign documents to a job.

## ■ Edit Office documents

Word, Excel and PowerPoint documents can be edited directly from the document view in NAV and saved as new versions.



# A UNIFIED SOLUTION WITH THE DMS FROM SIMOVA

The DMS from Simova can be complemented by additional components, as needed. With ecspand from d.velop, the DMS can be transformed from a simple document storage system based on a free Microsoft SharePoint Foundation Server into a revision-proof archiving solution. Would you like your ERP system to be expanded to include a comprehensive incoming invoice management system, in order to set up approval and release workflows, for example? Then our DMS combines with Document Capture from Continia to offer the ideal solution.

The DMS from Simova incorporates tools from various partners to create a well-rounded complete package, and offers your company a unified solution, in which the benefits of individual tools can be optimally combined and implemented.



## REVISION-PROOF ARCHIVING SYSTEM WITH ECSPAND FROM D.VELOP

ecspand carries out rule-based monitoring of document types that are required to be archived, which are subject to special conditions, converts these into durable formats (PDF/A, TIFF), automatically retrieves them from the SharePoint database and saves them in a revision-proof format on an external compliance platform. This guarantees that they can only be deleted after the retention period has expired.

This changes nothing from the user's perspective. The documents are retrievable like always via the SharePoint search, the metadata search, or the ecspand archive structure.



## INCOMING INVOICE MANAGEMENT WITH CONTINIA DOCUMENT CAPTURE

Document Capture for Microsoft Dynamics NAV is a certified add-on module, which enables you to edit your company's incoming receipts electronically during several stages of the process. Receipts can be registered, recognised, edited and saved electronically by scanning, PDF import or via email. The Document Capture add-on can be integrated seamlessly into the Microsoft Dynamics NAV application.

Implementing a template system in connection with a receipt analysis or recognition system (OCR) enables the automatic extraction of data from scanned documents, and the subsequent administration of the recognised information via Microsoft Dynamics NAV. As such, the standard purchasing processes in Microsoft Dynamics NAV (receipt entry, data recognition, conversion into purchasing receipts) within the scope of creditors and purchasing can be carried out with minimal manual work. At the same time, the electronic copy of the original receipt can be accessed within Dynamics NAV with a single mouse click.



Think outside the box.

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