



Sage ERP X3 EDM Electronic Document Management



A comprehensive EDM Solution available both inside and outside of Sage ERP X3

The world of business is becoming increasingly electronic and paperless. Yet we still have to deal with documents to deal with - including many on paper. We still have legal and regulatory requirements to retain accounting records, quality documents, contracts, acknowledgements and proofs of delivery. Auditors still need to follow a 'paper trail', but increasingly it's a trail of email and electronic documents rather than paper.

We don't yet work in a 'paperless office', but we don't want to be bound by paper. For reasons of simple economics, as well as the so-called 'green' agenda, we need to minimize our use of paper. Paper is increasingly an expensive way to do business. As well as the costs of generating, handling, transporting and storing paper documents, we have the inconvenience and risks of storing valuable business data on paper.

The Sage ERP X3 EDM Solution is a practical and efficient way to deal with paper where we need to and to eliminate it wherever possible. The EDM Solution comprises of a range of modules not only for storing documents electronically but also for generating and delivering documents electronically and for capturing email and paper documents. It is a comprehensive EDM solution, integrated tightly into the core of Sage ERP X3, and also available to 'external users' for use outside of the Sage environment.

How EDM solution addresses the challenges

Productivity

- Save time on filing and photocopying; printing and envelope-stuffing
- Make documents instantly available to staff throughout the office, throughout the company, throughout the world

Cost Savings

- Reduce postage, courier and fax costs
- Use less stationery
- Eliminate external document storage

Compliance

- Archive electronic and paper documents securely and cost-effectively
- Satisfy auditors and tax authorities

Business Continuity

- Eliminate the risk to vital documents from fire and flood
- Keep important records in a secure repository rather than on workstation hard drives and email In Boxes

Green Agenda

- Use less paper, fewer photocopies, and more efficient document delivery

Manage legacy documents

- Integrate non-ERP documents
- Simplify data take-on from legacy systems

Benefits

- Reduces the time taken to file and retrieve documents
- Makes staff more productive
- Reduces storage requirements for paper-based records
- Eliminates printing and postage costs
- Reduces environmental impact
- Maximize ERP data

Sage ERP X3 EDM functionality

Automated Document Archiving

Documents generated by Sage ERP X3 can be automatically deposited in the EDM repository. Simply by selecting the 'Archive' destination, reports and other documents generated through Crystal Reports can be converted to PDF format and archived. Documents normally generated in batches, such as customer invoices and statements, will be automatically broken down and archived individually. The archived copies will be linked to the transaction and /or business partner, as appropriate. Microsoft Office documents and transaction log files generated by Sage ERP X3 can also be stored in the repository.

More Secure Attachments

The Attachments feature which normally allows files in shared folders to be linked to objects in Sage ERP X3 now links to the EDM repository so that documents are securely archived and available to all users without the need for access to shared folders. Documents archived in the repository cannot be overwritten or accidentally deleted. New versions are automatically given a new revision number.

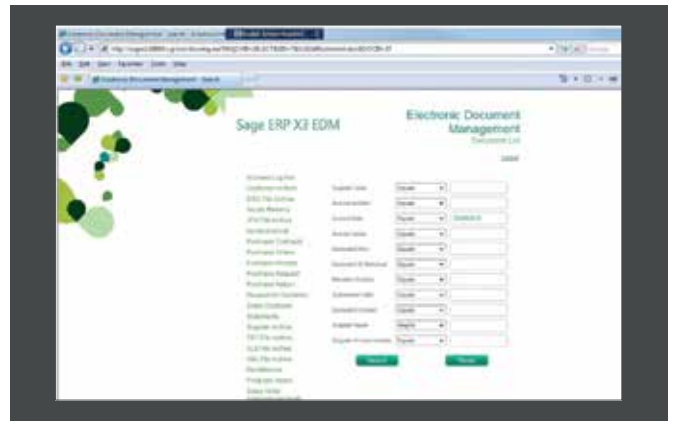
In addition to PDF files and scanned images, any type of file can potentially be stored in the EDM Solution, but the administrator can restrict this facility to common formats, such as Microsoft Office documents, supported by available software. The Attachments button against a business partner will typically be used for contracts, product literature, credit reports, price lists and miscellaneous documents. Whereas documents supporting an individual transaction such as invoices, proofs of delivery and certificates will normally be attached to the specific transaction to which they relate.

Automated documents by email or fax

Outbound documents and reports generated through Crystal Reports can be emailed or printed at the same time as being archived. An entire 'print run' of documents such as invoices, statements or remittances can be processed together with each document being sent to the relevant email address or printer automatically. Email addresses can be looked up automatically from the Sage ERP X3 database or read from fields on the document itself. Documents can also be automatically faxed - either through an SMTP fax gateway or using an optional fax server.

Instant access to all documents

Once a document has been archived, it can be accessed by any user of Sage ERP X3 - via the Attachments button, via new 'Documents' buttons on key screens or through the Sage ERP X3 Web Portal. Documents archived outside of Sage ERP X3, ie through a scan station, the Windows desktop deposit client or other Sage products, such as Sage CRM, are also available as far as they relate to Sage ERP X3 business partners, orders, products, etc.



Sage ERP X3 EDM Options

Deposit Client

Drag and Drop Filing from the Windows Desktop

Outside of Sage ERP X3 users can archive documents through the EDM Deposit client on the Windows Desktop. Files can be dragged and dropped into the system and associated with the relevant section in the archive. The relevant business partner or product can be looked up using a live link to the Sage ERP X3 Database. Additional metadata can be keyed in or populated automatically from the database.

As well as files, email too can be dropped in directly from Microsoft Office Outlook with the sender, date and subject being automatically transferred to the archive. Email can be archived complete with any enclosed attachments or alternatively the attachments themselves can be dropped in and archived as independent records.

Web Enabled

Outside of Sage ERP X3 documents can be accessed from a new web-based portal. Access levels can be defined to give 'external users' access only to selected sections of the document repository. The interface allows users to search the categories to which they are granted access. Regular searches can be stored for single-click access. Now everyone across the organization can view the documents they need - instantly.

Scan Station

Batch Scanning and Automated Indexing

Adding a scan station to the EDM Solution allows large batches of documents to be scanned quickly and efficiently. Indexing is fast and reliable as metadata is cross-checked against the Sage ERP X3 Database. Transactional documents, such as orders, invoices, proofs of delivery, etc... can be separated and indexed automatically using barcodes. The EDM Solution enables Sage ERP X3 to print barcode labels as transactions are entered to make archiving paper records as painless as possible. The transaction reference contained in the barcode label allows the EDM Solution to associate the paperwork with the transaction - and where appropriate with the business partner too - for fast retrieval later.



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