COSMO CONSULT
Business-Software for People

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Software
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cc|dms

EMAIL DELIVERY OF DOCUMENTS

WEB-BASED ACCESS   DOCUMENT MANAGEMENT WITH SHAREPOINT

AUTOMATIC DOCUMENT ARCHIVING   DRAG & DROP FILING

COLLABORATION   SHAREPOINT INTEGRATION IN MICROSOFT DYNAMICS NAV

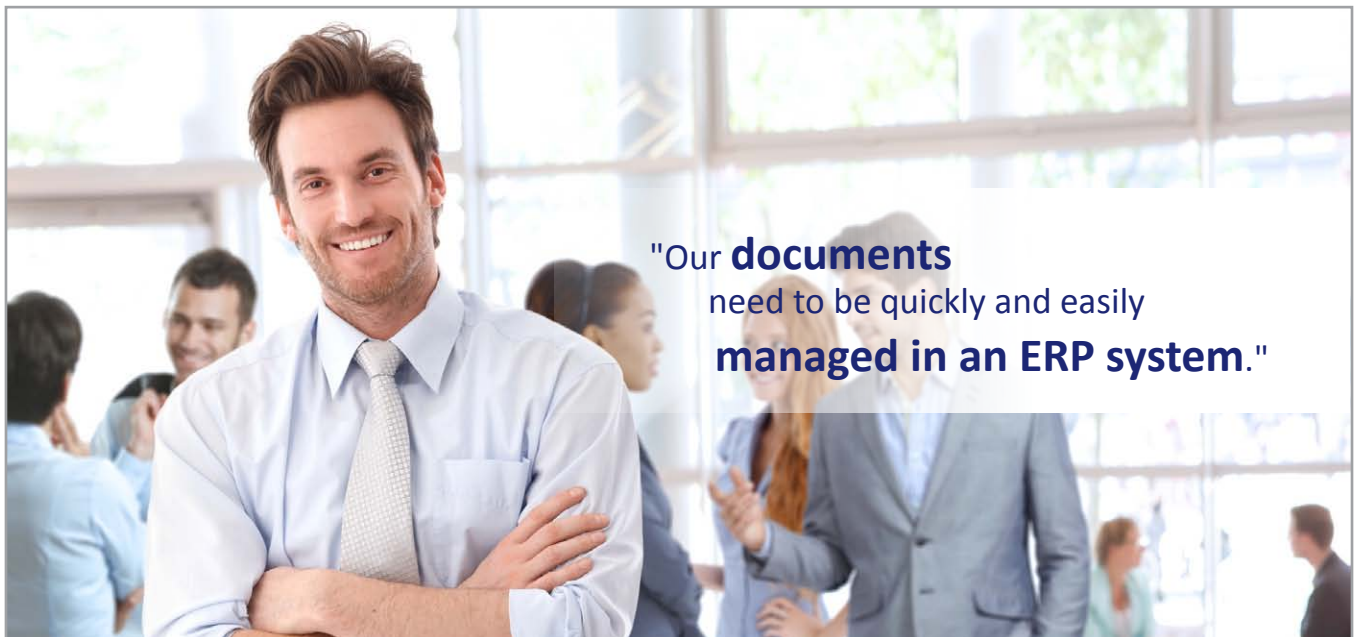AUTOMATIC INDEXING   CONSISTENT SYSTEM FOR DOCUMENT FILING

DOCUMENT MANAGEMENT

ALL DOCUMENTS RELATING TO A NAV PROCESS AT A GLANCE   STANDARDISED FILING STRUCTURE

Microsoft Partner
Gold Enterprise Resource Planning

COMPANY PROFILE

"Our **documents** need to be quickly and easily **managed in an ERP system**."

COSMO CONSULT specialises in the implementation and system management of **industry and business solutions** based on cutting-edge software technologies. We deliver industry-oriented complete solutions for mid-size businesses in the manufacturing, service and retail sectors by providing an extensive range of industry-specific and special solutions that use **Microsoft Dynamics** and **QlikView**.

We offer our customers more than 18 years of experience in the implementation of national and international projects for the introduction of the **Microsoft Dynamics NAV** (previously Navision) and **Microsoft Dynamics AX** (previously Axapta) ERP solutions. We are also experts in the **Microsoft Dynamics CRM** customer relationship management system and the **Microsoft SharePoint** document management and portal system, which can be seamlessly integrated into the ERP system environment. We therefore deliver fully integrated software systems for use in all areas of the company. Using the **QlikView business intelligence solution**, our customers are able to access all of their company data in a structured and manageable format at any time.

An **implementation method** tailored to the project is a prerequisite for successful software implementation. For over 15 years, we have placed our trust in proven implementation methods when implementing our software projects, such as **SureStep** for successful ERP project implementation and an **agile implementation methodology** for rapid results when realising business intelligence (BI) projects.
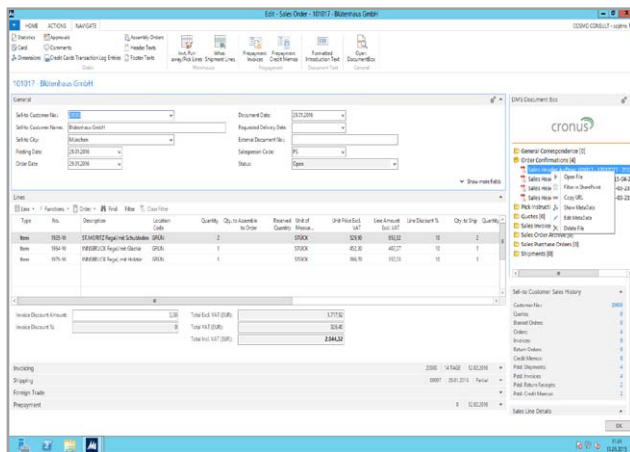
At COSMO CONSULT, people are our focus. After all, it is people who decide whether our software is efficient or inefficient, who judge its strengths and weaknesses, who experience joy or frustration when using it and ultimately determine if it is a success. That's why we provide:

Business Software for People

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Document Management for Microsoft Dynamics NAV with Microsoft SharePoint

INTEGRATED DOCUMENT MANAGEMENT VIA MICROSOFT DYNAMICS NAV BASED ON MICROSOFT SHAREPOINT

cc|dms facilitates easy and intuitive document management via Microsoft Dynamics NAV. Any documents relating to a particular data record in Dynamics NAV can be filed and displayed in Microsoft SharePoint in a structured format using the Windows Client offered by Microsoft Dynamics NAV. It is possible to interact with the documents directly via the Microsoft Dynamics NAV interface and the associated functions can be used without restrictions in Microsoft SharePoint.
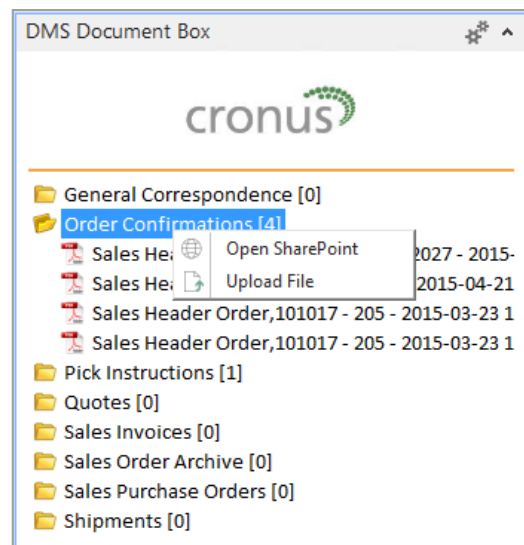

INTEGRATED DOCUMENT MANAGEMENT

DOCUMENT BOX INTEGRATED INTO MICROSOFT DYNAMICS NAV

The document box serves as a central filing location for documents in Dynamics NAV and allows to work in the familiar Microsoft environment. Documents can be filed quickly and easily using the drag and drop functionality. In line with the configured filing structures in Microsoft SharePoint, documents are automatically indexed using the metadata and stored in Microsoft SharePoint document libraries when uploaded via Microsoft Dynamics NAV.
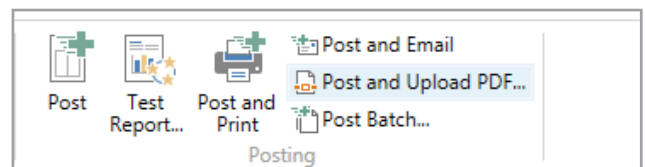The Microsoft Dynamics NAV client offers users a wealth of functionality for managing documents:

▸ Upload, open and delete files
▸ View and edit the metadata for a particular document
▸ View the SharePoint document library and filter documents
▸ Copy a link to a document
▸ Search
▸ Manage history/version

CC|DMS DOCUMENT BOX

AUTOMATIC DOCUMENT ARCHIVING AND EMAIL DELIVERY OF DOCUMENTS

Thanks to the additional "Post and Upload PDF" function, documents generated in the Microsoft Dynamics NAV client are automatically converted to PDF format and archived in Microsoft SharePoint.
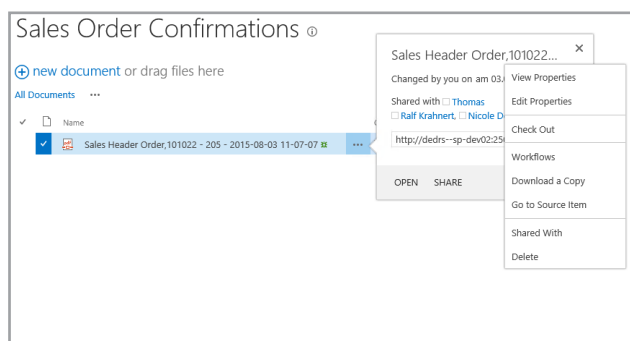

ADDITIONAL FUNCTION "POST AND UPLOAD PDF"

Indexing with the relevant metadata is also an automated process, and it is possible to send documents as an email attachment from Microsoft Dynamics NAV, too.

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DOCUMENT MANAGEMENT IN SHAREPOINT

Microsoft SharePoint offers basic functions for managing documents. Documents generated or archived in Microsoft Dynamics NAV can also be edited directly in SharePoint. The following functions are available:

- Save and edit documents
- Manage metadata
- Manage the version of a document
- Filter, group and sort lists and document libraries
- Automatically notify users of changes to libraries and documents
- Search SharePoint
- Configure views
- Integrate with Microsoft Outlook
- Design workflows for document analysis and sharing
- Assign authorisation access

DOCUMENT MANAGEMENT IN SHAREPOINT

THE BENEFITS OF CC|DMS AT A GLANCE

- Data record-specific integration into the Microsoft Dynamics NAV interface
- Easy filing, indexing and searching of documents
- Consistent system for document filing
- Automatic archiving of documents
- Rapid retrieval of process-related documents
- Integration into existing SharePoint installations
- Ability to use standard SharePoint functionality
- Complete setup can be configured in Microsoft Dynamics NAV
- Web-based, multi-site access
- Ability to give non-Microsoft Dynamics-NAV users access to the documents
- Mobile access to documents

STANDARDISED FILING STRUCTURE IN SHAREPOINT WITH THE LIBRARY SET

The library set represents a best practice filing structure in Microsoft SharePoint based on typical processes in Microsoft Dynamics NAV. The filing structure includes defined document libraries, document or content types and metadata fields for sections such as employees, products, purchasing, sales and service.
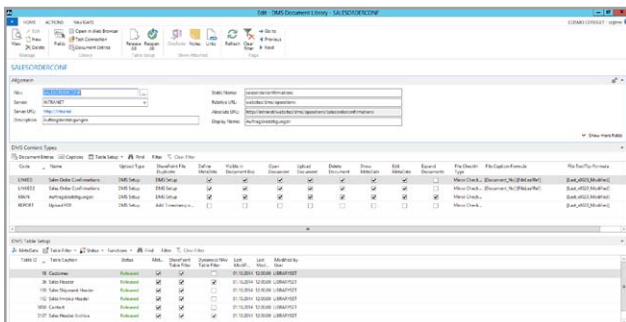
Individual adjustments to the filing structure are possible at any time.

cc|dms
Document Management for Microsoft Dynamics NAV with Microsoft SharePoint

THE BENEFITS OF THE LIBRARY SET AT A GLANCE

▶ Immediately available filing structure for Microsoft Dynamics NAV sections (employees, products, purchasing, sales, service)
▶ Quick introduction to cc|dms
▶ No analysis of the actual and target structure is required
▶ SharePoint template is based on best practice experience

CC|LIBRARY SET (EXTRACT)

SYSTEM REQUIREMENTS

▶ Microsoft SharePoint Foundation 2010 and higher or Microsoft SharePoint Server 2010 and higher (and SharePoint Online)
▶ Microsoft Dynamics NAV 2013 and higher

POTENTIAL FOR INTRODUCING MICROSOFT SHAREPOINT AT YOUR COMPANY

Microsoft SharePoint is the ideal platform for supporting communication and collaboration in business. It offers a wealth of functionality for creating, organising, managing and sharing documents and information, and allows communication among teams and within the company to be more transparent and more efficient. Based on this functionality, company-specific solutions can be provided for document management, contract management, team and project portals, digital workspaces and workflows

for approval and sharing processes (e.g. vacation requests, approval of project deadlines, etc.). Apps and solutions designed by third-parties can be used to extend the functionality.
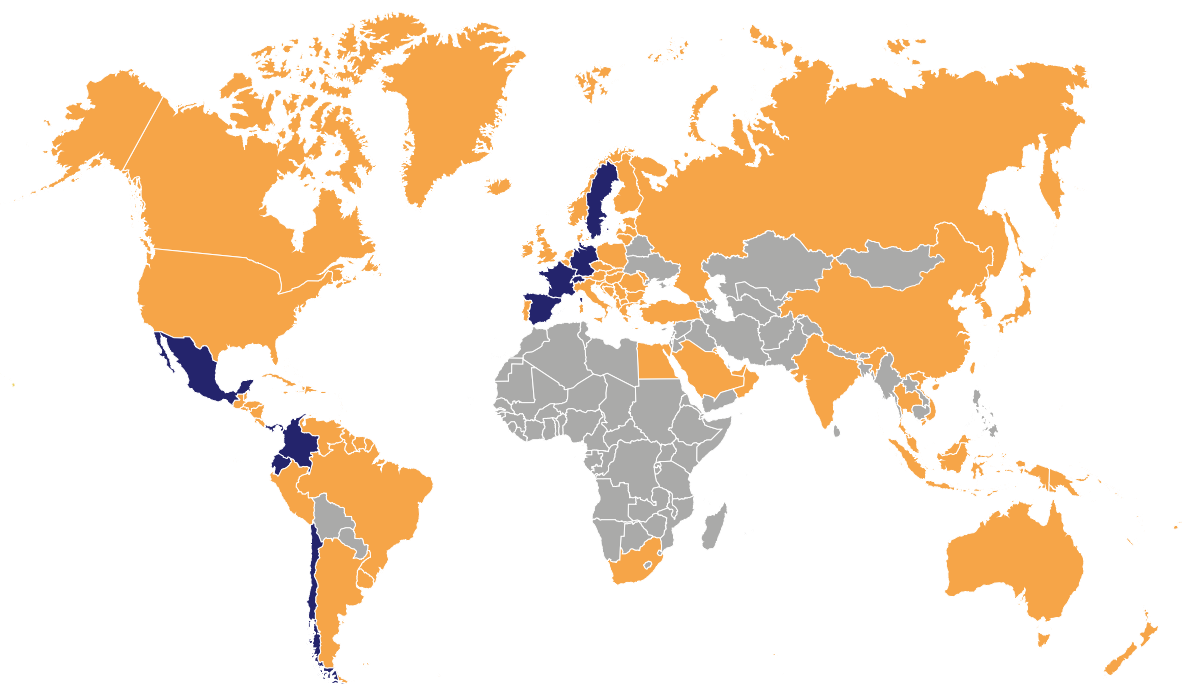
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