



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
 DISTENSION

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



COMPANY PROFILE



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



cc | dms

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.

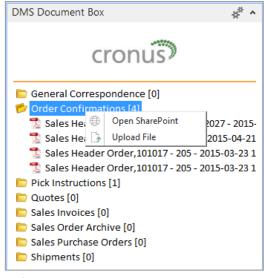
				Edit - Sa	les Order - 107	017 - Bildenhaus I	intii				- 6
 HOWE ACTIONS 	NAVGATE									COSMO CO	KSULT + sciet
States Streets Carl OCovers Descon Code Car	E Assert Nesder Dissortion Log Entries C Footer Disso	Tes	A Auto Maa Ao Lees Shiphert Line Therefore	Assessment Page	neni fan Ienas Irastu	tan let Conte	-tion				
101017 - Bildenhaus General	GmbH									DMS Document Box	
									£.*	DWs Document bos	
Self-to Castomer No.	10	*		Document Date:	29212006	*				-	
	URINA AND COULT			Requested Delivery Data					cronus		
Selle Oy	Under			Enternal Document Neur							
Resting Date:	6.01.2016 v			Salespenon Cable	PS					C General Correspondence (0)	
Order Date 2	8012016 +			Status	Open ;		*			Criter Confirmations [4]	
									Y Severality	Sales Hoa P Open Fie	10
										Tales new 🕄 Film in Shareho	
Unes										Sales Hear == Copy ORL Pick Instructing Show MatuOate	-41
	Coler - N Find Filter T									Contracted in a local de	
Type No.	Description	Location Code	Owny Of		ed Unitol	Unit Price Each	Line Arreute Doi: 127	Line Discourt S.	Child Ship Quarter	E Sales Invoice X Dainy File	
ten 1925-W	ST.MORITZ Repail mit Schublede		2		stic	510	992.02	. 10	1	Sales Order Anthewarter	
how 1954-W	NEERLOX Repline Game	(PUN	T		STOCK	452.30	40,7	10	1	C Sales Parchase Croers [0]	
Ren 1875-18	PARAMUCE Repl, mit Holdsin	SION.	1		snicx	164,75	10,13	. 10	- E	E sebuera la	
										1 8	
d										Sel-to Customer Sales History	
										Cattorner Nev	200
Invoice Decourt Amount		1,38	Ten Ed Val (SUR)			1.707,62				Cartos Resist Online	
invoice Discourt No			(tot) furned			105.40				Orders	
			Tene Incl. VAT (SUR)			2.144,32				inees .	
										Return Coders Caulti Mensus	3
Invoicing								1000	WINE DICH .	Pail Demets	
Shipping									(2012)211 (Perio)	Patil invoces	1.0
onggong Enmige Trade								000	anton new *	Pail Return Facagita	
roreign trade Prepayment										Pahl Codi Mercan	
									0 E182316 *	Sales Line Details	
cabalican.											

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:

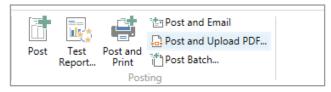
- Upload, open and delete files
- View and edit the metadata for a particular document
- View the SharePoint document library and filter documents
- Copy a link to a document
- Search
- Manage history/version



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.



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

Sales Order Confirmations 🛛		Sales Header Order	101022 ×
	Changed by you on am 03. Shared with Thomas		
✓ L Name ✓ R Sales Header Order,101022 - 205 - 2015-08-03 11-07-07 ≭		http://dedrssp-dev02:25	Check Out
		OPEN SHARE	Download a Copy
			Go to Source Item Shared With
			Delete

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

						Edit - DMS Dec	ament Libr	ery - SALESO	DERCONE				- 0
HOME	ACTOR: NAVGATE												COSMO CONSULT - HIM
Q Das Xor	Tan Cowarter	1			Ratiach Oas	+ Grite 4 Providual 9 Read							
ALESOR	DERCONE												
Agomein													4
New	2010/01/09/01	-		Statut	ame Tare	No. of a construction of the construction of t							
Sener	ATAVET			April 1	1176 Int	atu in geralim				_			
Same UKL	may / Simonal			1000	ettry lies	a line and we to feel	the lease of a	en 'ndersederi re	e instant	_			
Designin	A designation of the second second					reprinted a part				_			
										_			
													V Shewmanite
DMS Corner	t Tapes												
Departer	Bere El Capton El Tele	ino • A tra	File To Gerlin										
Cale	_ Nere	Optional Types	Manufairt File Duplome	Dafrie Metabolis	Malifie in Decement Bo	Cial Elecander	Uplicat Decimient	Dolete (A) cument	Steel Metalate	E28 SkruCate	Exand Decements	Fix David: Fix Captum Famoula Type	Ris Sectly formula
UNES	Sales Oxfor Confirmations	04554-p	EM65etar	R		×	2	2	2	*		Merchek, Searert, N. (SidesRe)	Dat_0001M-dried
1198822	Talas Ordie Confirmations	DATS Setup	D455et-p	10 C	H	14	R	2	N .	1		Mear Dails, Second (N/Shlarfel)	(Lat, 4522, Multiel)
85479	AuftraptionEmpurger	145 1 mut	EAG Server	8	8	8	8	×	12	8	×	Mesi Chulka	BAR, HG23Hidred
REPORT	Upland FDE	24554-0	Add Treasland on	- 0	0	0	0		0	0		Men Deck.	(ماشار226,643)
EMS Table 1													
	10 Intelline - 12 States -												
Table O	. Telle Cadler	State	MeL. Stereford Table Filter	Table Filter	Model.	Last Modified in Mod., Ukar							
	H Cadoree	Rubined	8 8			12,0000 UBRAFISS							
	26 Siles Heater	Referent	8 8	3		12/00R UDRATING							
	100 Salas Shipmand Hawter	Robused	N N			12.00.00 U-BRATHS2							
	112 Salas Innoise Header	Rolemed	8 8			12/00/8 UBRARISE							
	ESE Cartest	Enlement	м к			12:008 0064052							
	127 Salas Heather Studius	Enternal	N N	2	21.10.2014	tomos upekinysi	1						

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.



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, companyspecific solutions can be provided for document management, contract management, team and project portals, digital workspaces and workflows

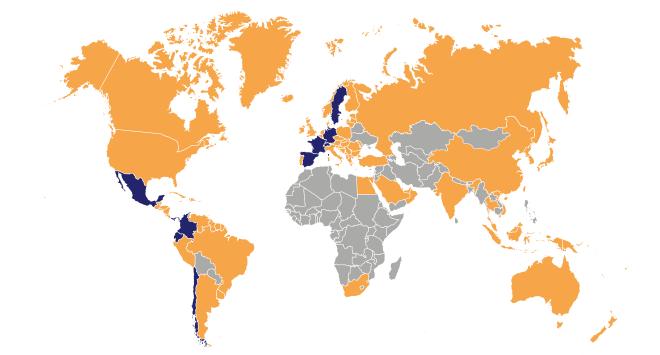


For your own notes









GERMANY | FRANCE | SPAIN | SWEDEN | SWITZERLAND CHILE | COLOMBIA | ECUADOR | MEXICO | PANAMA

www.cosmoconsult.com