



COSMO CONSULT
Business-Software for People

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Software
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cc | dms

WEB-BASED ACCESS

EMAIL DELIVERY OF DOCUMENTS

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

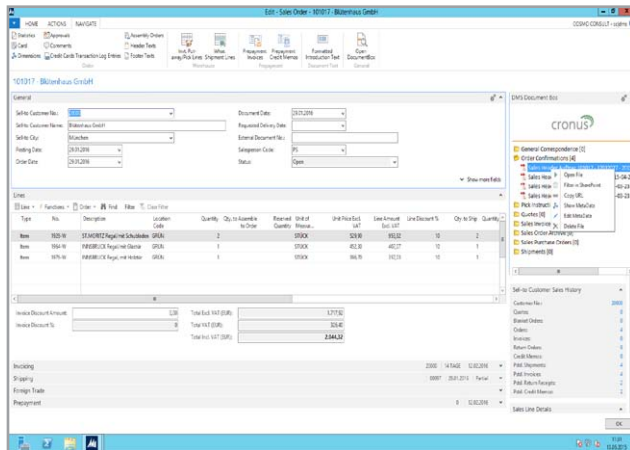
ALL DOCUMENTS RELATING TO A NAV PROCESS AT A GLANCE

STANDARDISED FILING STRUCTURE

Microsoft Partner
Gold Enterprise Resource Planning

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.

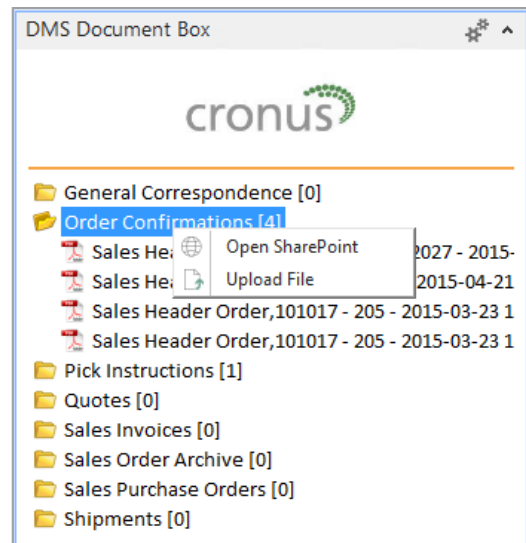


INTEGRATED DOCUMENT MANAGEMENT

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:

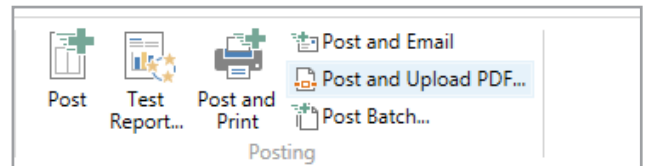
- ▶ Upload, open and delete files
- ▶ View and edit the metadata for a particular document
- ▶ View the SharePoint document library and filter documents
- ▶ Copy a link to a document
- ▶ Search
- ▶ Manage history/version



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.



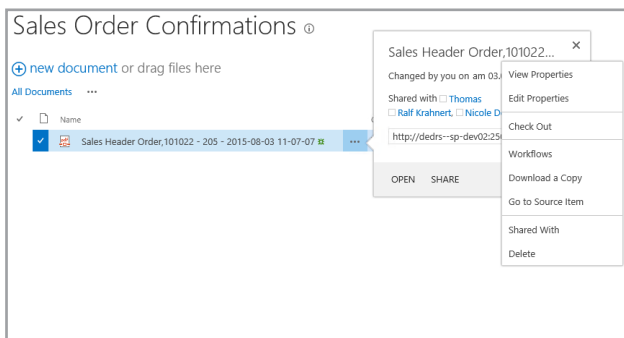
ADDITIONAL FUNCTION "POST AND UPLOAD PDF"

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.

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.



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

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.



Code	Name	Source Type	Destination File Structure	File Name Structure	File In	File Out	File Extension	File Size	File Date	File Time	File Path	File Extension Prefix	File Path Prefix
10000	SalesOrderConfirmations	DMS Table	DMS Table	%Y-%m-%d-%H-%M-%S	✓	✓	✓	✓	✓	✓	✓	✓	✓
10001	SalesOrderConfirmations	DMS Table	DMS Table	%Y-%m-%d-%H-%M-%S	✓	✓	✓	✓	✓	✓	✓	✓	✓
10002	SalesOrderConfirmations	DMS Table	DMS Table	%Y-%m-%d-%H-%M-%S	✓	✓	✓	✓	✓	✓	✓	✓	✓
10003	SalesOrderConfirmations	DMS Table	DMS Table	%Y-%m-%d-%H-%M-%S	✓	✓	✓	✓	✓	✓	✓	✓	✓

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

RESELLER PROFILE

Naviona is a Microsoft partner and Dynamics NAV reseller with a long history of implementing and supporting the manufacturing verticals from COSMO Consult. As the premier reseller we have become the go-to partner for advanced manufacturing implementations based on Dynamics NAV in the US.

Naviona is the 'Navy SEALs of Dynamics NAV'; we are experienced, well trained and we get the job done. Our customer base is primarily manufacturing and distribution companies where finance, operations and inventory management are in focus.

The services provided includes everything from project management to development, we do full Dynamics NAV implementations, optimizations of business processes and ongoing support. We are also available if you just want a second opinion about something related to Dynamics NAV.

Our team is located across the US, from Tampa in the southeast to San Diego in the west. Feel free to contact us for more information or to request a demo.

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