



Document Management with Workflow

Overview

Perform business processes quickly, consistently and with less human interaction by configuring document-centric electronic workflows that can route documentation according to pre-defined rules or ad-hoc decision opportunities.

The Value of Document Management with Workflow

- Workflow can be automatically initiated by invoices being scanned, faxed, e-mailed or received by electronic data Interchange (EDI)
- AP documents are consistently processed in less time than traditional paper-based operations, enabling your organization to reduce costs and take advantage of available vendor discount deadlines
- Load balancing abilities
- Simultaneous notifications
- Alternative routing logic
- Ad-hoc workflow tasks
- Create instant access to unstructured documents from within various SYSPRO screens, minimizing time spent retrieving information
- Eliminate the need to search for paper documents by storing documents
- Provide an inherent document trail for unstructured documents
- Protect and verify the integrity and security of all documents
- Minimize the need for physical storage of business documents, saving money on facilities costs or allowing storage resources to be directed toward more valuable usage of physical space
- Improve responsiveness to customer and vendor inquiries

Matching Document Management with Workflow to your business

- Allow for the capture and management of unstructured documents such as Vendor Invoices and Proof of Delivery Notices
- Capture, store and retrieve electronic documents or paper documents that have been scanned, as well as other types of media
- Automatic indexing from auto-filling index fields
- Supporting documentation can be automatically cross-referenced, allowing users to double click from one document and retrieve a related document
- Provide a central document repository that can be accessed by authorized users to easily access information from across business locations
- Ensure that business processes are followed
- Provide a clear audit trail
- Timers for follow up and processing ensure prompt attention to your business needs
- Approval processes based on your particular business rules

Integration

- Document Management with Workflow integrates with the Purchase Order and Accounts Payable modules
- Could integrate with any SYSPRO module

