

DOCUMENT MANAGEMENT



Document management—simple, powerful, and effective

For most businesses, managing documentation is not an end in itself. It is an essential part of day-to-day operations, ensuring that the right information is available to the right people at the right time. Mismanaging the flow of information can result in confusion, unnecessary delays, and costly errors. With IFS/Document Management™, our simple yet powerful approach to document management, you will have full control over your company's documentation to focus on the things that really matter: selling your products and services—and, ultimately, meeting or exceeding your business goals.

The problem with many conventional document management systems is that they are often designed as independent entities, with their own unique interface, terminology, and procedures. Not surprisingly, it takes a long time to integrate such a system into your corporate setting, and the learning curve can be unnecessarily steep. In your daily operations, even minor documentation changes can turn into a veritable obstacle course for many users. That translates into unnecessary expenses, not greater savings.

With IFS/Document Management, the emphasis lies where it should be: on the user and the business. In practice, our solution becomes a natural extension of the software with which most users are familiar. They can access the right documents swiftly and smoothly using whichever interface they prefer, be it Microsoft® Windows® or a web browser. Indeed, 90 percent of IFS/Document Management users need no more than 10 minutes of training to get going, while specialists get a powerful tool that handles complex tasks. Who said you couldn't have the best of two worlds?

IFS/Document Management is part of the IFS Applications™ ERP system, which is comprised of components that work independently of each other in an open, flexible program architecture. As a result, they can quickly and easily be combined, modified, and upgraded to meet the changing needs of a company.

IFS/Document Management can also operate independently of the ERP system and can be smoothly implemented without disrupting everyday operations.

Part of the extended enterprise

IFS/Document Management Web is part of IFS Personal Portal™, which enables you to share and develop your documentation with your customers, suppliers, and partners. IFS Personal Portal only

displays the information intended for that specific user, whether he or she is inside your company or outside. From IFS Personal Portal, you can search for and view documents, or you can get information about documents that need your approval or that have recently been published.

The right tools for your needs

Different employees within a company have different responsibilities, including document management tasks. IFS/Document Management offers three different user interfaces for a differentiated document management approach.

Desktop interface

The desktop interface offers the perfect entry point for many users. It is easy to learn and use, and gives you all the functionality needed for basic tasks such as viewing and printing documents. You can access the interface from Microsoft® Windows® via the Personal Folder and the Start button. Using the Find feature, you can then easily retrieve documents. The interface makes document management virtually invisible to the user while ensuring that your documentation remains controlled and organized.

Windows-based interface

The Windows-based interface packs more powerful functionality and is a better fit for the advanced user. You can check documents in and out for review or approval, or create new archives—just some of the many options designed to help you move documents through their life cycle.

Web-based interface

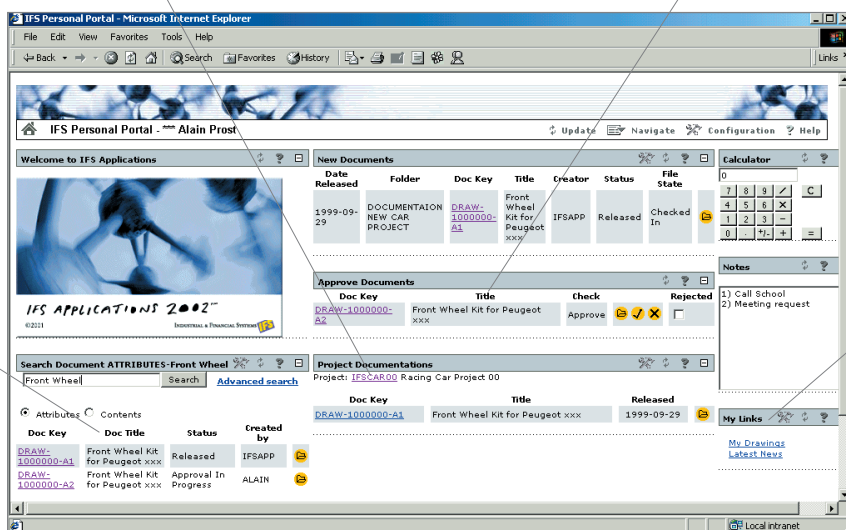
The web-based interface, IFS/Document Management Web™, offers the same advanced functionality as the Windows-based interface. Requiring no installation, this interface also lets you bookmark a single document or all documents belonging to a project, and then add the bookmark in your Favorites folder or as a hyperlink in your Personal Portal. Another benefit: you can publish your documentation on your company's intranet.

The documentation associated with your project is displayed here

Here are the documents that are waiting for your approval

Search by document attributes or contents

Easily create links to documents that you often use



With IFS Personal Portal, it is easy to get the information that is of interest to you.

Powerful and effective document management

Managing documentation is a continuous process. IFS/Document Management is designed to simplify all the stages of a document's life cycle. Thus documents are assigned a status that reflects the stage within their life cycle: preliminary, approved, released, or obsolete. More importantly, formal and procedural documentation requirements are fully under your control, and some procedures are performed automatically by the system.

Significantly, IFS/Document Management handles files in their native format. When you need to create a CAD drawing, quote, monthly report, diagram, job description, or flow chart, you obviously want to use the software that best suits the task at hand. And when it's time to edit any of those files later on, you want to do so in the original context and application, like AutoCAD®, Microsoft® Word®, or Microsoft® Excel®. IFS/Document Management makes this possible—and it helps you set up and apply standard templates to any type of file to ensure that each document within your company has a standard format and appearance, no matter where it was created.

Once a document is ready for review and approval, you can define which reviewer is authorized to view, edit, or approve a file. Every step of the approval process requires an electronic signature for user verification. This signature is saved and can easily be traced later on. An approver having to sign off on a document can be notified by e-mail or via Personal Portal.

Comments and corrections for a document can be gathered in a redlining file. That makes for an efficient approval process and, in fact, encourages interaction among employees and departments within a company.

Depending on how detailed you have initially classified your documents, your search for documents can be specific or broad. You can search by particular attributes (such as project name, customer name, or invoice number) or simply by document contents using free-text searches.

In most offices, the unceasing flow of information has become a fact of life—and a liability. That's why all documents, new or revised, are distributed in a manner that gets the receivers' attention. You can notify each receiver by various methods, like e-mail, text messaging (SMS), or via Personal Portlet. You can easily define how and when the distribution is to occur. And you can distribute a single document or a group of documents, to one or more reviewers. A built-in tracing function indicates who received a particular document and when.

Advanced document administration, such as classification, grouping, and revision and approval management, can be performed for all types of documents. Smart methods ensure correct distribution, and with IFS Event Server™ the latest documents are sent directly to the users who need them—right to their e-mail inboxes.

Naturally, all events are saved in a history for traceability. Document packages with milestones can be connected to the associated project module for follow-up. There are also functions for mass entering and management of templates.



Key Features

- Easy to learn, easy to use
- Gives you a choice of interface: desktop, Microsoft® Windows®, or web
- Can also be run through IFS Personal Portal
- Simple template for creating documents
- Document import functionality
- Handles documents in native format
- Approval routing, revision handling, and document distribution
- Supports redlining, macros, and invoice scanning
- Allows you to send documents and signature routings via e-mail
- Free-text searching as well as document retrieval using your preferred classifications
- Lets you define security and user privileges
- Can be used as a stand-alone product or as an integral part of any IFS business solution

About IFS and IFS Applications

IFS develops and supplies component-based business applications for medium and large enterprises. IFS Applications, which is based on web and portal technology, offers 60+ enterprise application components used in manufacturing, supply chain management, customer relationship management, financials, engineering, maintenance and human resource administration. IFS provides customers step-by-step evolution to the extended

enterprise with e-business solutions that offer partner, customer, and supplier collaboration.

A top global business applications supplier, IFS has 3,200 employees, with sales in 43 countries. The company is listed on the Stockholm Stock Exchange (XSSE:IFS).

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