

# EASY for NAVISION: Archiving for Microsoft Dynamics NAV.

## **Transparent and revision-proof archiving.**

With its linkage to the leading document management system EASY ENTERPRISE, EASY for NAVISION is the perfect extension to Microsoft Dynamics NAV (previous name: "Navision"). Internal and external documents of all types are archived in a revision-proof manner, and are available for display in Microsoft Dynamics NAV at any time. Incoming and outgoing documents are assigned to overall transactions, so the context of the documents can be traced at any time. In addition, it allows very convenient retrieval of all archived documents directly from Microsoft Dynamics NAV using the known search functions (such as Navigate).

## **Automatic document archiving.**

All internal documents are archived fully automatically by printing or posting documents. This ensures all documents are actually archived, and guarantees legal requirements are implemented with revision-proof archiving. The archiving process is performed in two steps, which are separate steps in terms of time: In the first step, documents are prepared internally in Microsoft Dynamics NAV for archiving and put in an archive queue. Basically, documents are created in PDF format and index fields are filled. In the second step, the prepared documents are transferred to EASY ENTERPRISE.

## **Convenient scheduling of archiving.**

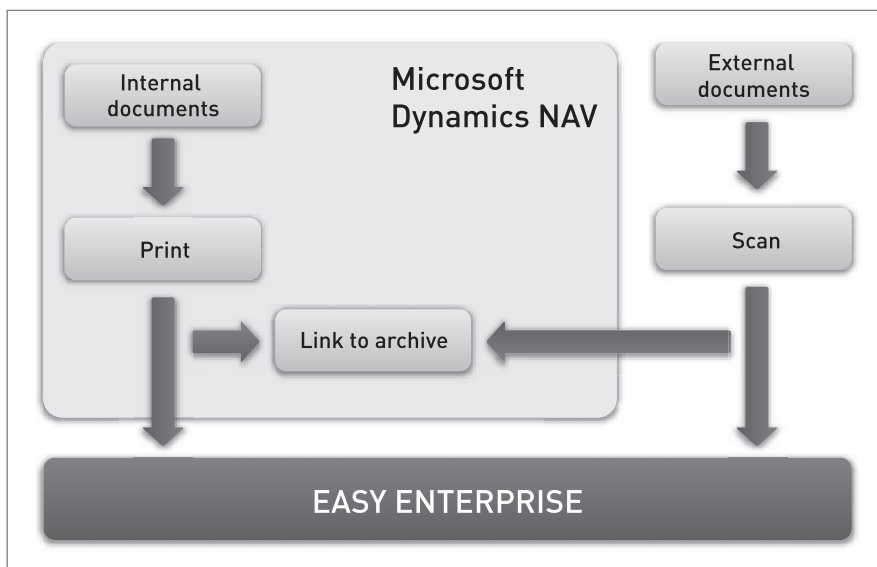
To ensure system performance even for huge document volumes, the archiving process can take place at a different time, e.g. while tending to your everyday business. EASY for NAVISION provides differentiated options to define cycles that control document transfer to the archive through a scheduler. Temporarily available documents that are changeable after archiving, e.g. quotes or purchase orders, are logically archived directly while being printed. So EASY for NAVISION prepares these documents for archiving during printing. The actual archiving process, however, is performed through a scheduler in batch operation: either at a regular interval, e.g. hourly, or outside of operative business hours, e.g. every night at 10 p.m. for huge document volumes. This procedure ensures that a new version is prepared for the archive when changing already archived documents, so each print version of a document is automatically archived.

### A clean transaction file.

Another procedure is available for posted documents which are no longer modified, e.g. invoices. Here archive preparation and the actual archiving process can be performed together via batch operation, and at a different point in time during usual everyday business.

EASY for NAVISION organizes your incoming documents because each document is linked to a Microsoft Dynamics NAV transaction. So you will be able to always trace the internal processes that triggered delivery notes or incoming invoices and which documents are associated with them. Of course, you'll need to scan your incoming documents. Each incoming and

scanned document is then linked with the corresponding Microsoft Dynamics NAV documents via a unique key. Multiple document criteria can be summarized to a single unique key. EASY for NAVISION clearly organizes your documents into a single transaction file.



Internal and external documents can be conveniently archived in EASY ENTERPRISE

**Sorting via barcodes.**

When returning outgoing documents to your company, e.g. delivery notes including recipient's signature, using a barcode system is a logical step. Barcodes are printed along with documents on creating documents. When returning and scanning documents, the process is identified via barcode, so documents are correctly assigned to processes fully automatically. If scanned documents are not yet to be assigned to a process, they will be temporarily saved in a Dynamics entry sheet named "Queue." Assigning processes will then be performed manually by the user or automatically by the system when the initially missing link criterion is present.

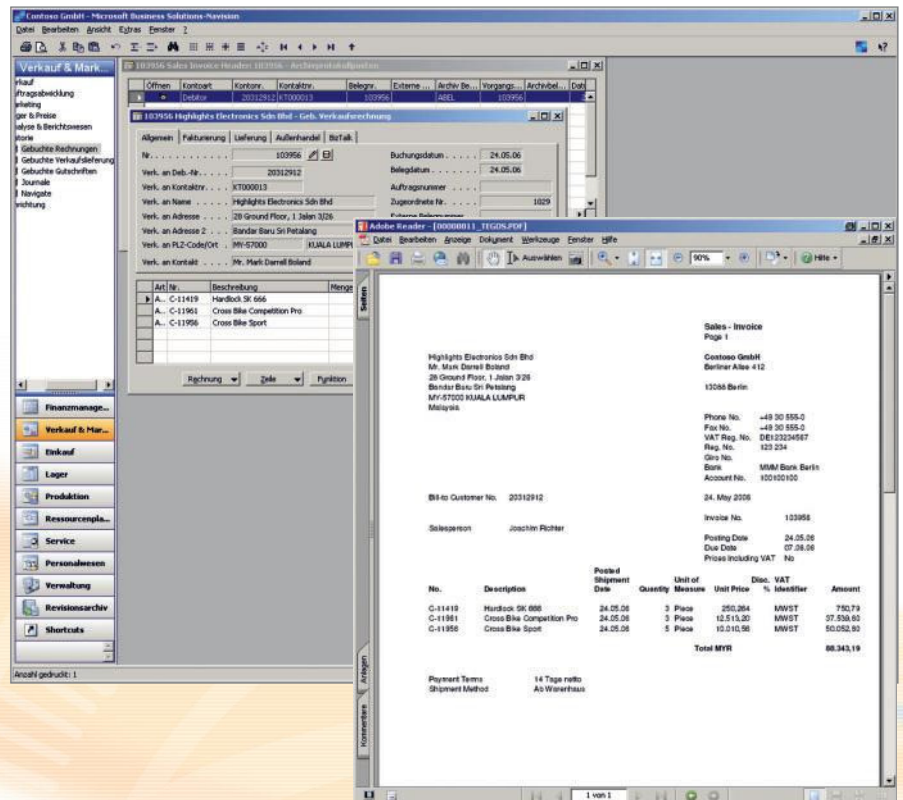
**Perfect creation of reports.**

EASY for NAVISION not only archives documents, it also archives all types of reports and analyses. So deadline-related Open Items lists or accounting statements can be stored in a revision-proof manner. EASY for NAVISION enables storing of periodically created reports, so not only the archiving process but also creating reports can be automatically triggered.

**Various formats for archiving.**

External files such as e-mails, Microsoft Word or Excel files or PDFs linked with Microsoft Dynamics NAV processes or Accounts Payable/Receivable can also be archived, of course. Preparation for the archiving process is already triggered while assigning the external files to a Dynamics process.

EASY for NAVISION easily processes and manages internal and external documents



**Convenient indexing.**

Various types of system data can be used for indexing documents via EASY ENTERPRISE: Of course, not only manually filled Navision data fields, but also calculated fields or data resulting from user-de-fined functions. By default, the following data fields are prepared for indexing, and can therefore be used for searching/retrieving archived documents:

- Accounts receivable
- Accounts payable
- Address code
- Contact number
- Document type
- Document number
- External document number
- Purchase order number
- Project number
- Archive document ID (barcode)
- Process code

**Free search/retrieval options.**

EASY for NAVISION provides a variety of options to search for archived documents or complete transactions:

- From tabs
- Through defined search queries
- Through the Microsoft Dynamics NAV function Navigate
- Through manual filtering in archive log items

Archived data can be searched/retrieved both from Microsoft Dynamics NAV and from the EASY archive with branching to Microsoft Dynamics NAV. This branching, of course, will only be possible if a target document linked with the archived document is present in Microsoft Dynamics NAV.

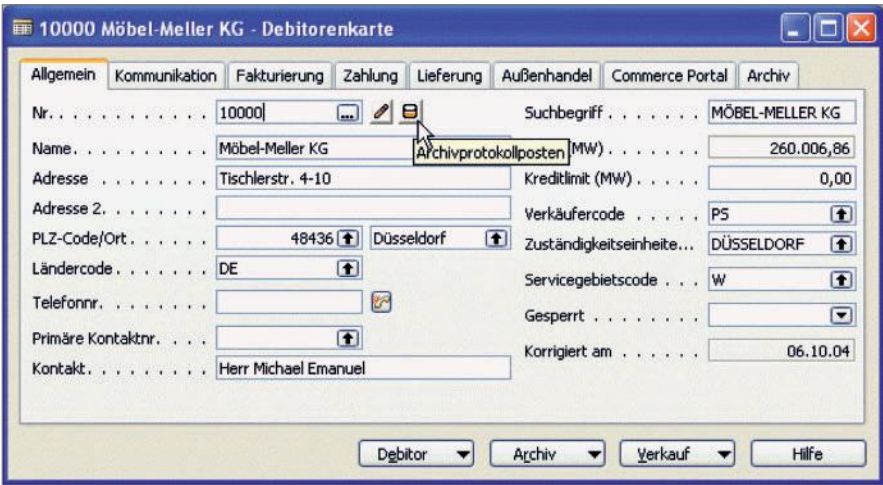
- Perfect linkage to Microsoft Dynamics NAV (Microsoft-certified)
- 17 document types have been defined in the Navision standard
- Revision-proof archiving and search from the Dynamics interface
- Extensive organization and search options as well as a high degree of automation
- Scheduled archiving: Bulk data can be processed overnight
- Clear assignment of incoming documents via of unique keys
- Clear assignment of returned documents via of barcodes (all currently known barcode scenarios are supported)
- Regular reporting that can be flexibly controlled

**System requirements.**

Retrieval from EASY for NAVISION can be performed via the extremely convenient “Navigate” function that all users are familiar with, or you choose the option to search directly from your native workstation environment, e.g. from the input masks from accounts receivable, accounts payable, posted orders or from the items. Moreover, Microsoft Dynamics NAV can be used as a retrieval client

for all documents stored in EASY ENTERPRISE.x, regardless of their origin and removing the need to install additional client software on the user’s desktop. Using the new EASY XML Server guarantees high investment security.

EASY for NAVISION supports Navision versions 3.70 or later as well as EASY ENTERPRISE.i 3.40 or later and EASY ENTERPRISE.x 2.0 or higher. EASY for NAVISION can be combined with both the native Navision database and a Navision installation on the Microsoft SQL Server. The standard viewer is started from a hyperlink.



Just one of the search options EASY for NAVISION provides: searching from tabs

- Linked external files can simply be archived automatically
- Convenient indexing ensures reliable later searches
- Various search options
- Search from the EASY client or directly from your familiar environments