Workbench SBO

Project Management for SAP Business One

Functional Overview

For

Document Management

CHANNEL
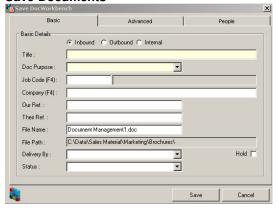
SAP

PARTNER

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DocWorkbench provides an effective and practical tool for the creation and management of all Outbound and Inbound documents. The software is implemented on the desktop as a separate application to Workbench in order to make it available to all staff involved with project related documents and thereby provide a corporate solution for document management.
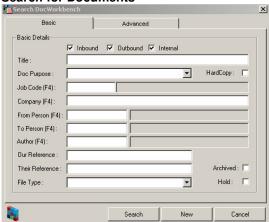
Features include:

- ☐ Integration to MS Office – Word, Excel, Powerpoint, Outlook.

- ☐ Record and store documents in any file format and view with the native application or compatible viewer.

- ☐ Store and Retrieve documents with an extensive range of user defined criteria including:

    - o Job Code
    - o Document Title
    - o Document Purpose/Type
    - o Company
    - o From Person, To Person.
    - o Author
    - o Our Ref, Their Ref.
    - o File Name
    - o Status
    - o Key Words
    - o Date Range

- ☐ Extensive search functions on the Workbench database for:
    - o Jobs
    - o Companies
    - o People
    - o Email Addresses

- ☐ Save Emails and Attachments with option to save attachments separately.

- ☐ From MS Outlook use the DocWorkbench search function to locate files to be attached to Outbound Emails.

- ☐ From within MS Office applications email the current document as an attachment.

- ☐ Create Word Documents from templates that contain merge fields from the Workbench database.

- ☐ Mandatory Save fields to ensure the integrity of the document register.

- ☐ User defined conventions for system generated Folder and File Names.

- ☐ User defined Internal References.

- ☐ Integrates with Microsoft Explorer to locate and register files from applications that do not integrate with DocWorkbench.

- ☐ Register Inbound hardcopy documents and record physical file location.

- ☐ Integration with other Workbench modules:

    - o Drawing Register
    - o Meeting Minutes
    - o Actions/Tasks.

Save Documents

Search for Documents

Email Address Lookup