



EDM Electronic Document Management

Finally, easy access to your information

Proginov brings you a tool to facilitate the storage and retrieval of your documents, while also ensuring data security and sharing.

// A shared document database

EDM is used to store your company's documentation electronically, whether for invoices, delivery notes, orders, internal documents, product documentation, etc. It helps your teams work collaboratively by facilitating information access and sharing. It leverages the company's documents according to their life cycle, from creation to version management to archiving.

The main features it provides are: multi-folder management (with management of access rights), search by keywords and full-text, automatic archiving from a scanner, secure viewing of documents from outside the company (partners, suppliers, sales representatives, etc.) via a web browser.

More than just an Electronic Document Management system, the Proginov EDM is a real shared document database.

// Multiple uses

In addition to routine document management (storage of quotations, invoices, delivery notes, etc.), Proginov provides additional uses thanks to the Web EDM system. Information such as product documentation, technical descriptions, delivery notes can be shared between customers and suppliers. The system can also be used to manage business projects or in-house projects, for instance the construction of a building. It is also a valuable tool when it comes to timestamping and electronic signatures.

// Keep information flowing smoothly

An EDM system generates quick gains in terms of quality and costs for organisations. It is also the starting point for many extensions like electronic invoicing, intranets and forums. Whether it is used from within the ERP or via the web, different workflow scenarios can be set up, such as sending an email when a document is modified or requiring an approval process before a document is published. Fully integrated with the ERP, the EDM system is accessed directly from the product, customer, supplier or job sheets.

Secure access to information

Paperless document storage



Integrated and shared document base



Full text search



Collaborative work

TOP FEATURES OF THE ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

MULTI-FOLDER MANAGEMENT

- Concept of public/private/system folders
- Specific settings for each folder
- Search and informative criterion functions
- Manage chapters and sub-chapters

TREE STRUCTURE VIEW OF DOCUMENTS

- Concept of internal/external documents
- Create shortcuts and aliases to external documents
- Edit documents in decentralised mode
- Use search criteria
- Associate documents and attachments

SEARCH BY CRITERIA OR KEYWORDS (tags)

FULL TEXT SEARCH

AUTOMATIC ARCHIVING FROM A SCANNER

- Configure destination folders
- Configure search criteria (keywords)

ARCHIVING FROM THE PROGINOV ERP

- Documents generated by the Proginov ERP system (quotations, delivery notes, invoices, etc.)
- View archived documents from the ERP system

DEFERRED DOCUMENT ARCHIVING

- Concept of pending documents

DOCUMENT HISTORY

- Store different document versions

TRACEABILITY OF CHANGES TO FOLDERS AND DOCUMENTS

- View document properties
- View histories of actions on files (view, modify, print, delete, etc.)

RECYCLE BIN MANAGEMENT

CUSTOMISED DOCUMENT LISTS

- Configure columns
- Dynamic colour change depending on the column values

SECURITY AND ACCESS RIGHTS TO DOCUMENTS

- Rights by location and rights by user/group

EMAIL/FAX DOCUMENTS

- Compression options

IMPORT MULTIPLE DOCUMENTS BASED ON CRITERIA

DOCUMENT STATISTICS

- Distribution by EDM criteria (customer, type), by the document creator, by date, etc.

PRE-MADE WORD TEMPLATES

INTEGRATION INTO THE ENVIRONMENT

- Add external documents: Microsoft® Office suite, Windows, etc.
- Automatic import (with batch confirmation) of documents from other applications, scanned documents, etc.
- Export by document or directory
- Event-driven alerts (workflow) on EDM actions (document creation, modification, etc.)
- Copy & paste for integration into a Microsoft Outlook® message
- Windows shortcut to an EDM document
- Automatically generate CRM events
- Manage user help folders

WEB ACCESS TO THE EDM (from the Proginov CMS)

- Download documents or compressed folders
- Send documents by email
- Group several documents into a single email
- Search contacts (access to the ERP contact database)
- Create documents
- Trace actions (view, download, modify, etc.)
- Dynamic full text search on authorised documents
- Multi-criteria search
- Discussion forum: post messages with attached documents
- Share internal and external documents according to the rights defined in the ERP system

ERP INTEGRATION

- View documents in the Proginov ERP files
- EDM component on the Proginov ERP portal
- Insert items from the EDM system (logos, terms and conditions, attachments for an email, etc.) in ERP documents

PROGINOV // ERP Universe



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PROGINOV
business management software

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