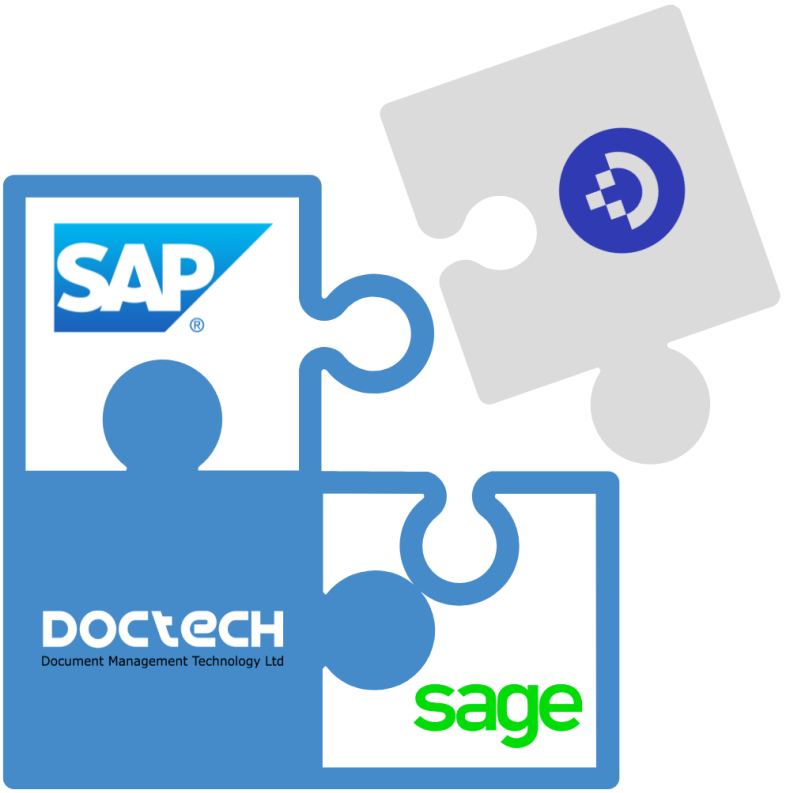
DocTech Whitepaper

Document Management System Integrations



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Document Management Integration

More often than not businesses expect their various applications to talk together and want a **Document Management System** which interacts with their other systems. At DocTech we not only embrace this idea, we are pioneers in the methods and techniques used to achieve a slick, integrated solution.

What is Software Integration?

Software integration refers to those applications that work closely together to offer a seamless solution to help organisations work more efficiently. Integration can bring together various types of software so they 'talk' to one another and share information.

Combining software in this way means data is no longer isolated and information is not disjointed.

Why is Integration Important?



Software integration is important as it **ensures your processes can keep up with the demands of the business.** In the past, one or two systems may have been enough to manage but as the company grows, it's likely you'll need extra technology. The more systems you begin to use the more work is needed to manage them. It may become overwhelming and apparent that you need to rethink you're approach.

If management need to look in an ever growing number of places to understand company performance, then issues can start to creep in. Which system holds the latest data? What if information is duplicated? Who has ownership?

And these problems may be exacerbated further if important information is stored across paper and network folders as well as different software applications.

Management need real time information at their fingertips which is why software integration is so important.

What are the Advantages of Integrated Software?

There are a number of advantages to having integrated software rather than standalone systems. Often the information housed in one is needed in another. Client information in your CRM system for example will also be needed in your finance package to process orders.

Reduce Manual Data Entry

You may currently copy and paste from one system into another, or manually type the same data across multiple applications. Not only is this labour intensive but it is error prone and time consuming.

Integrated software means separate applications work together so data can be collated, processed and analysed as if it was one. We often refer to this as a 'Single Source of Truth'.

Increase Communication



Departments working in isolation with no visibility of what others are doing can result in duplicated work or poor customer service. The sales team for example should be aware of any issues with an existing customer before they approach them for an upsell.

Understanding and having the visibility to see what others are working on by having your software integrated means problems can be eradicated before they even start.

Reduce Reliance on IT

Old systems that are no longer supported can cause a wealth of problems for IT departments. Access issues, maintenance and lack of integration options can mean IT spend more time on fixing problems than working on new initiatives.

While exporting your business data out of an old system may seem like a daunting task, having it in a secure cloud solution with integration options means you're using technology that can be relied up.

Ensure you choose the right software providers to help and that they have enough experience with software integration to meet your organisational needs. **Having important company information in a Document Management System means your data is secure with a complex rights structure**. It is protected against viruses, natural disasters and misuse.



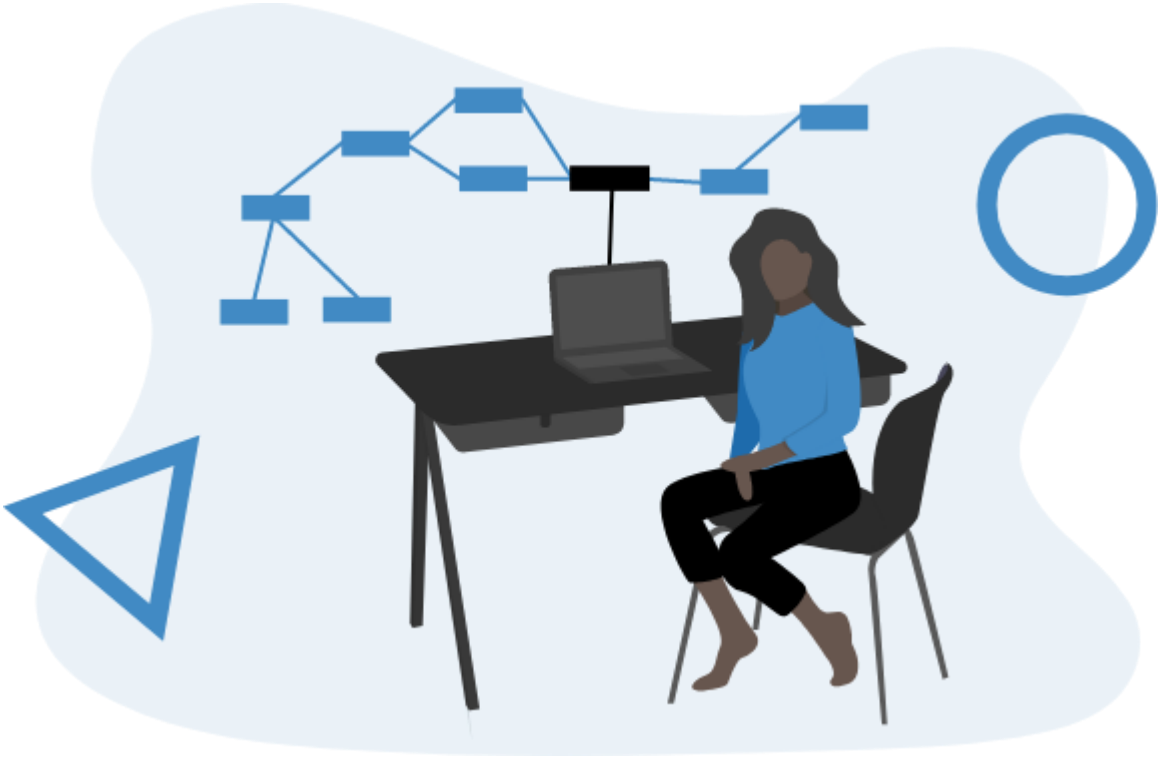
ROI

If you're managing multiple systems, struggle to find the information you require and have disjointed processes because of the various applications you use, it's likely you're wasting time and losing money.

Integrated software helps to automate processes as information can be pushed seamlessly from one to another reducing manual data entry and the errors it can cause.

Overheads in the form of printing, paper, lost data and customer order errors can all begin to hinder a company's profitability and reputation.

Data connectivity across departments provides visibility and transparency which in turn can lead to increased sales. Easily viewing stock levels, invoice payments and deliveries via integrated systems means any mistakes can be spotted and rectified quicker.



Learn More About Integration with DocTech

Why Do It?

Our solutions have delivered success to organisations across multiple **industries**, all with different levels of integration requirements into a variety of existing software systems. An IT infrastructure that works as one will bring improvements in efficiency, productivity and a reduction in errors.

It's Easy

Whether you need business process advice or a fully-bespoke, integrated digital document management solution installed, DocTech is perfectly positioned to help. We have four decades of experience and expertise in digital document management solutions, as evidenced by our expansive portfolio of satisfied clients.

Futureproof

We're industry leaders when it comes to electronic document management and process improvement systems. Our experience and expertise translate to more efficiency, better productivity and higher profitability for your business. The scalable architecture of our solutions means they grow with your organisation, future proofing your investment. What more can you ask for?

Everything You Need to Know About DocuWare Integrations

At DocTech we understand the need to have your different software solutions talk to one another. We know exactly what can be achieved with DocuWare's powerful integration capabilities.

DocuWare is a highly secure and scalable **Document Management System** that will bring benefits to various departments including Finance, HR, Sales and Compliance.

DocuWare is integrated with more than 500 different applications worldwide, including ERPs, CRMs, Office 365 products such as **SharePoint**, Finance systems and HR packages.

A DocuWare implementation from DocTech comes with more than **80 years of technical expertise** and know how.

With DocuWare your organisation can process large volumes of information in one central system, with easy access for users based on the rights they have. Advanced **data capture** and storage capabilities means information can accurately be used across a variety of integrated systems.

Due to its web-based development, DocuWare is generally open for every kind of digital infrastructure. The Platform Service is the central gateway and API through which you can access and integrate with DocuWare via programming.

An API (Application Programming Interface) allows DocuWare to talk with your other applications and communicates what you want so it can understand and fulfil the request. Whether you have internal developers or want to use our in-house development team, the API allows maximum automation and integration capabilities.

By integrating DocuWare's document trays, you can scan documents from your existing applications with no programming and process them from there. DocuWare's **Intelligent Indexing** is available for automated indexing of these documents, which removes manual data entry.

DocuWare can be used to pull data from an external source and go on to populate data in your other systems.

We have integrated DocuWare into businesses ranging in size and industry, with both off the shelf and bespoke software packages. Bespoke solutions are coded using modern languages and platforms, offering best case future proofing and security.

Read our blog for more information on **DocuWare Integrations.**

DocuWare and SAP

We are often asked about **DocuWare's integration** with ERP (Enterprise Resource Planning) solutions and in particular SAP, the ERP market leader. At DocTech we have years of experience and numerous DocuWare and SAP integrations under our belt.

We firmly believe the implementations that provide the best value are those with systems that work together to improve processes and reduce cost.

ERP and Document Management

ERP software helps to manage day to day business processes such as stock control, supply chain management, sales, finance, logistics etc. using a single system. It gives management the visibility to monitor operations across every aspect of the business.

This in turn produces large volumes of documents which all need to be stored and processed according to various legal regulations. This is where ERP integration such as SAP with a document management system like **DocuWare** plays a vital role, as neither system can do what the other does.



Once documents are archived in DocuWare they are immediately available for any SAP requirement, such as recalling an invoice linked to a SAP record. DocuWare can 'sit' within the SAP environment via an integrated button enabling staff to view documents without ever having having to leave the ERP system.

A unique value applied in both systems such as a barcode or the SAP DocID provides this seamless link.. DocuWare is accessed via a web browser so no additional software installation is required.

Incoming and outgoing documents created in SAP can be stored in DocuWare with SAP filing strategies supported such as early and late storage. For example an invoice can first be stored in DocuWare and then booked in SAP, or the other way around where the invoice is captured in SAP and then stored to DocuWare.

The Benefits of SAP Integration

- DocuWare has been a **certified SAP Partner** since 2001 and the software is regularly submitted to SAP for testing to ensure the latest compatibility.
- There are **high levels of security** between both systems using encrypted SSL/TLS.
- **Streamlined and automated business processes** by enhancing visibility and access to information across the organisation.
- **Avoid errors and duplication of data** as copies are updated across systems opposed to multiple entries of the same data.
- Be **audit ready** with documents filed where they should be and **retention rules applied**.
- A future proofed system as DocuWare implements the current SAP interface standard ArchiveLink Version 4.7 and is upwardly compatible.

Through feedback from our customers we know the difference this type of document management integration can make. Whether it's **the security and ease of having documents saved in a central repository**, or increased production by eliminating manual tasks.

If your organisation is using SAP or any other ERP system, speak with us about how w**e can enhance your processes** through DocuWare integration and ensure better insight and reporting across the business.

DocuWare and Smart Connect

Smart Connect is a module within DocuWare that when integrated with your other software, reads the information directly from it. DocuWare can recall any associated document related to a project, transaction or employee.

When in your finance software processing a transaction with a supplier, **you can click the embedded Smart Connect button to display the related invoice**, stored in DocuWare. Separate buttons can also be added to display a delivery note or any other document in your process.

Alternatively for HR managers, when you open an employee record in your HR Management System, a click of the Smart Connect button can instantly show all stored information relating their performance reviews.

A feature of Smart Connect is the 'Highlight Search' and an example of when it can be used is when you receive an email related to an invoice query. The invoice number contained in the email can be highlighted and with a keyboard shortcut, the invoice automatically pulled and opened from DocuWare.

Smart Connect comes as a standard with **DocuWare Cloud**, and can be added as an additional module with DocuWare On-Premise.

The Benefits of DocuWare and Sage Integration

DocuWare and Sage Integration could prove crucial to any growing business as managing paper finance records is error prone and labour intensive.

A well-known food manufacturer with 12 business locations recently started using **DocuWare.** They told us it **took one finance administrator 3-4 days a week, to type invoice information** into Sage.

Managers were also manually typing data to compile a weekly report, looking across multiple sources and duplicating work. As the information had already been keyed in once, staff were wasting a lot of time and their core responsibilities suffered. Data on paper, in filing cabinets and in network folders meant sourcing information caused further delays.

Creating Efficiency With DocuWare

Implementing DocuWare and integrating it with Sage meant their invoice process could be streamlined. Invoices are now scanned at each business location and automatically indexed by DocuWare.

Intelligent Indexing is a service that learns how to "recognise" index terms wherever they are on a page. As an invoice is scanned, key information such as customer name, product, invoice number or price are extracted and saved as index fields in DocuWare.

It is these fields the company can now easily use to search for information, quickly accessible to anyone from anywhere with authorised access.

The department head then electronically receives the invoice and corrects any missing index terms. With machine learning, DocuWare goes on to remember these corrections to give more accurate results on the next scan.

Once the costs are reviewed an electronic stamp is used (just as you'd stamp a paper invoice), and the invoice is sent to the Finance Director. Here it is given one final review before being stored in DocuWare.

There is a tight integration between DocuWare and Sage. **It allows the finance team quick access to documents stored in DocuWare, right from within Sage.** There's no need to switch between Sage and DocuWare or leave their desks to find a paper invoice. A click of the integrated button in Sage recalls the related document from DocuWare and opens it in Sage.

Benefits of Integrated Software

This manufacturing business **reduced data-entry time by 40 hours per week**, allowing staff to focus on other key parts of their job.

The Finance Department can **instantly answer supplier payment queries** as the information is quickly found in DocuWare.

Staff no longer have to provide information for managers as they have **easy access** to it themselves.

Their Finance Manager said the biggest advantage of the DocuWare and Sage integration is being able to **instantly perform a cost analysis**:

"Every month I do an income statement review. I can easily run a report in the system and be instantly aware of what we are spending. With DocuWare we ended up making our processes better and easier, with the end result being we catch things that would otherwise have been too hard to spot. This kind of insight is invaluable to us".

DocTech have the **experience** of integrating with a variety of Sage packages and will happily discuss any other more bespoke requirements you have.

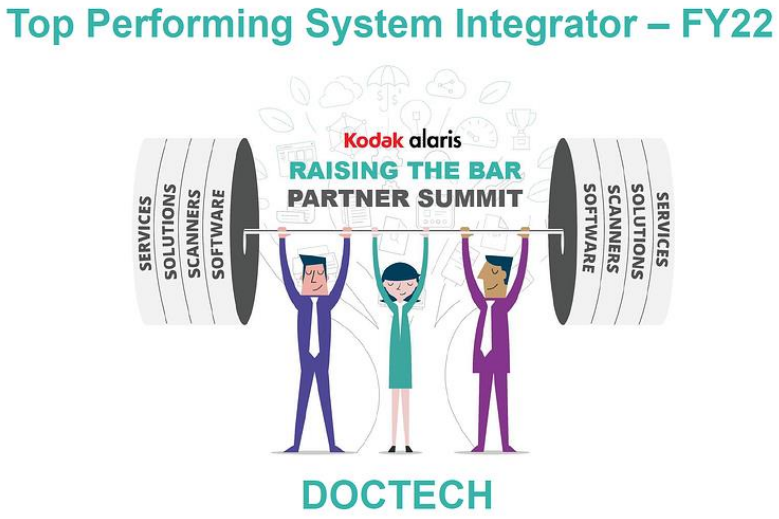
If your business is still struggling with outdated, manual or paper processes then you could benefit from DocuWare and Sage Integration. Book a discovery call with a member of our team to chat through any questions you may have and to hear how we could start streamlining your processes today.

Why Choose DocTech for your DocuWare Integration

DocTech are the UK and Ireland's most experienced DocuWare partner with a partnership spanning close to 40 years. For 16 consecutive years, DocTech have achieved DocuWare Diamond Club status.

We **integrate our solutions into a variety of third party applications** and we work alongside various platforms including ERP, Finance Software, HR Systems, CRMs, Case Management and Housing Management Platforms. We can also integrate with key business hardware such as scanners and multifunctional devices.

In 2022, we were awarded 'Top Performing System Integrator' by Kodak Alaris at their annual Partner Summit. An award recognising the value software integration brings.



Whilst there are common elements of functionality that each customer desires, a lot of document management integration **requirements are specific, based on individual business requirements** and the software packages involved.

Our technical team will explore integrations with any third-party system in order to bring the maximum improvements to your processes.

We firmly believe **the implementations that provide the best value are those with systems that work together** to improve processes and reduce cost. Your staff can use the same systems they are used to but with DocTech solutions 'sat within them'. **Lagan Specialist Contracting Group** did exactly that when they needed more efficient business processes, integrating with their existing Facilities Management System.

The three pillars of our implementation strategy are **Integrate**, **Innovate** and **Invigorate** – integration is a key part of what we do.

If your organisation wants the **advantages of integrated software to reduce manual data entry and to take back control over your processes** then speak to us. We want to help you with the challenges you face and work on a solution together.

Our document management solutions will make a difference. **Book a discovery call** with a member of our team and find out how simple it is to start making that difference.