

Document Management Oracle EBS R11i and R12



Boosting processes, relieving staff, saving costs by

- generating documents more easily
- without printing, enveloping and franking of letters,
- saving time, when not sending by mail,
- fast and efficient document retrieval,
- archiving documents,
- reducing storage capacities.

PRIMUS Document Management (PDM)

- is optimizing the creation, management and archiving of your documents.
- will send outgoing documents per email or fax to customer or supplier—free of charge, without loss of time, without the need to scan. Order confirmations and purchase orders can be managed considerably faster.
- is saving a lot of time when creating your documents (compared to E-Business Suite Standard Edition).
- will print documents automatically at the desired paper tray, depending on the type of document.
- can transfer documents, according to customer requirements (e.g. printing a delivery note and sending it in advance to the customer by email).
- accesses on archived documents directly from the application (e.g. invoices from your receivables transactions screen).



Your Benefits

- Archiving of single documents
- Archiving of documents created in a batch run
- Archiving of external documents:
 - Auto-Check In by email
 - Check In of any files for supplier, customer, project
- Supports multi-org and multi-language environments
- User authorization and metadata management
- Concurrent Manager journal archiving (Log- und Out-files)

Features for outgoing documents

Archiving

- As single document
- Every version, only the first, or only the last version per document type
- With direct access to the document from the corresponding E-Business Suite application
- Check In of any files belonging to supplier, customer and project

Printing

- On pre-printed forms or blank paper (also colour printer)
- With or without company logo depending on customer and type of document
- With or without terms and conditions depending on customer and type of document
- Marking of copies
- Access to paper tray according to the type of document (forms, blank paper)
- Managing copies according to customer and type of document

Mailing

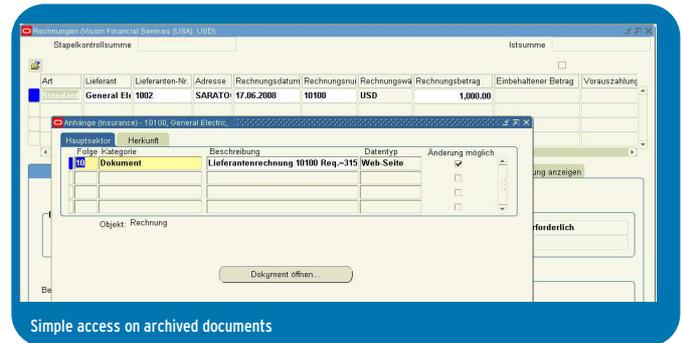
- With or without terms and conditions depending on customer and type of document
- Marking of copies
- Allows for individual delivery or facilitates central mail office depending on type of document.

Faxing

- With or without terms and conditions according to customer and type of document
- Marking of copies

Oracle iStore

- Customers have access to their (archived) invoices using iStore functionality



Documents

(Examples)

Outgoing documents:

- quotation
- order confirmation
- delivery note
- invoice
- request for quotation
- purchase order

Incoming documents:

- supplier's offer
- confirmation of order
- supplier's invoice
- commercial correspondence

Features for incoming documents

Process: „Archiving by email“

- Incoming documents (e.g. customer order) can be archived by simply forwarding them to a special PDM-eMail-address. PDM will automatically start a archive-Check In process and create an attachment within the E-Business Suite.

Process: „Directory Archiving“

- PDM will automatically create an individual directory for each business partner/project, which is available to your employees on a network drive
- The employees are archiving documents (e.g. customers packing requirements) just by saving them into the corresponding directory. PDM will automatically start a archive-Check In and creates an attachment within the E-Business Suite.

Additional PDM Processes:

- Process „Circulation-controlled handling of supplier's invoice“
- Process „Workflow-controlled handling of supplier's invoice“