



# Document Management System



Manage your documents efficiently in a paperless way

## YOUR BENEFITS:

- Full integration in your business processes
- Direct access from within all CSB-System programs
- Considerable cost and time savings
- Reliability due to intelligent data management
- Full integration of QA manual with automatic revision
- Fulfilment of the principles for data access and verifiability of digital documents (GdPdU) and proper IT-aided accounting systems (GoBS)

Efficient and audit compliant: using the integrated Document Management System by CSB-System you can manage all your documents in paperless form. The DMS meets all technological and legal requirements for electronic archiving of information and archives your documents automatically and reliably without the need for complex and costly interfaces or certifications by third-party systems. User companies enjoy:

- Improved security and efficiency in the daily handling of your documents
- Significant time savings in archiving of and searching for documents
- Central source for corporate knowledge
- Complete document consistency
- More transparency due to company-wide availability of documents

## DIRECT EFFECTS:

Utilization of the DMS generates the following savings compared to the processing of paper documents:

- 4-fold time savings in archiving of documents
- 18-fold time savings in document search
- Just 1/3 of the costs compared to traditional filing of documents
- Ca. 75% cost savings compared to paper invoice

Benefit from fast and flexible management of all your documents and save valuable time and costs.

## Archiving Made Easy

Full integration of the DMS in the CSB-System allows for electronic archiving of all your documents in an easy and quick way. The archiving process runs in the background of the respective user process: the required information is prepared centrally by the system and transferred to the archive while logs of the archiving processes are generated at the same time. Access to the archived documents on audit-compliant media is available at any time.

Documents from third-party programs can also be archived without any problems using the DMS by CSB-System. Any third-party program with save and print functions can be integrated quickly, easily and fully automatically without the need for adjustments.

**AUDIT-COMPLIANT  
ARCHIVING WITH  
A SYSTEM**

## ARCHIVING FEATURES:

- Archiving from within any standard application
- Archiving of any document (orders, invoices, dunning notices, inspection records, etc.)
- Importing of external documents using drag and drop
- Archiving of individual or batch scans (supplier invoices, customs documents, delivery notes, etc.)
- Archiving of incoming and outgoing emails
- Archiving of all file formats
- Creation of digital personnel files

- Creation of a fully integrated QA manual with automatic revision
- Check-in and check-out function for each document
- Automatic version management
- Certified electronic signature for documents

### Finding Documents in a Flash

The Document Management System offers a convenient document search function. Search results are generated in a matter of seconds. Integrated bookmarks and user-specific search masks provide a high level of user friendliness. Depending on the respective document group, you can use different search criteria or view a list of pre-defined search criteria. The search for documents is accelerated considerably with the help of

a hit list which is displayed in line with the search criteria you specified. Opened documents can be annotated using numerous options like stamps, texts or post-its.

### SEARCH FEATURES:

- Freely definable search keys
- Integrated bookmarks
- User-specific search masks
- Complete customer file
- Integration in CRM/SCM Cockpit
- Full text search from within Office documents and emails
- Annotations with numerous options
- Search from within external modules using Data Trade

### Instant Access to all Documents

The DMS by CSB-System is fully available via internet so you can access any document you need at any time and from any location worldwide. You can regulate document access for each user via a comprehensive authorization hierarchy. Benefit from the advantages offered by the uniform user interface and work on your documents, processes or projects independent of time and location.

**Fast, efficient and flexible: the DMS by CSB-System frees up office space, optimizes corporate communication and reduces administration and management costs. You achieve more security and efficiency in the daily handling of your documents.**

### PRACTICAL EXAMPLE:

The company GS Schmitz utilizes the Document Management System by CSB-System for paperless archiving of data. Managing director Astrid Schmitz explains the advantages of this solution for the company:

**"Requirements in this area have increased a lot. Documents have to be archived in paperless form and must be available at the push of a button, as required by law. The CSB-System makes this very easy for us even though we have between 300 and 400 documents per day. We have been able to cut administration costs in our company significantly. The easy document access saves time and increases efficiency in our day-to-day business."**

