

Case study: Document management in SAP

Gripping advantages Optima Group



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Gripping advantages

Unification, harmonization, centralization - Keywords that electrify persons responsible in IT. Especially in large, complex companies with a variety of decentralized locations. Unified processes and data secure an efficient filing and fast access also in the document management. Particular advantages were created for the Optima Group through a SAP integrated solution.

Unified processes and data secure in the document management

As part of the Enterprise Resource Planning, the document management has coped with high requirements. Clear aims therefore apply for an efficient document management: company-wide consistent and transparent rules for the filing of documents, fast research, a location-independent access. In addition to that, especially large companies have to integrate a variety of pre-systems because of the high number of different document types. At the same time, the documents have to be linked with economical systems to reach a clear allocation.

Central SAP System

The world market leader Optima Group project-relatedly produces filling and packaging plants as well as plants for the lyophilisation of pharmaceutical

products. The automation software represents a further focus of the portfolio. In addition to the parent company OPTIMA filling and packaging machines GmbH in Schwäbisch Hall, the German companies Inova, Kugler, Klee Q-Bag and auto.con as well as the Italian company AMOTEK and the French association Sierem belong to the group. Furthermore, the Optima Group maintains purchase bases in the USA, the United Kingdom, in Mexico, Brazil, Japan and Korea. 80 percent of the sales are economized through export.

All companies of the group use the central SAP application server in Germany: Altogether 640 user and 11 company codes at eight locations. The locations are connected via Multiprotocol Label Switching (MPLS) and Virtual Private Network (VPN). The group SAP PS plays a highlighted role for all companies. To reach a company-wide access to the documents and a unified management, the group decided to introduce a SAP document management at the headquarters in Schwäbisch Hall, Germany.

Fast access

The objections of Optima for the document management project: SAP ERP 2005 is the leading system and complemented with powerful add-ons it becomes a comprehensive document management. Leading system means: All tasks are performed in SAP R/3.

Analogously to the SAP platform, the new solution as a central application should unify and simplify the document capture, management and access. For this purpose, documents from different systems like CAD drawings, requirements specifications, acceptance certificates, orders, printed invoices had to be integrated and linked with the corresponding SAP receipts. Further requirement: Compliance with statutory requirements for the archiving of documents.

Today, the Optima's user use the integrated biz²Office, which is deeply integrated in the SAP GUI (Graphical User Interface), for the document management with aid of the applied biz² ECM-Suite of the inPuncto GmbH - the software specialist for SAP.

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Although documents in SAP R/3 are basically regarded from two points of view - SAP R/3 DMS and SAP ArchiveLink documents - the biz²Explorer allows a fast navigation through definable tree structures. The differentiation DMS and ArchiveLink does not play a role any more. A preview with thumbnails simplifies the selection of documents.

"Project-relevant documents used to be distributed in different files and locations in the company", Hanspeter Preissler, project leader at the IT sections of Optima, remembers. "Today, the employee moves to a SAP project and immediately sees all documents that are allocated to the project. This is a very essential work simplification for a single and low volume producer like Optima with comprehensive project documentation."

It does not matter if it is about Office documents, PDFs or extracts of SAP R/3 information: The necessary program for the integrated view which is needed for the respective document is automatically started by biz²Explorer. The export and emailing of image data can be performed with a simple handling through the pixel-oriented biz²Viewer which is also installed.

Scan and archiving

All invoices that reach the company as paper-based invoices are scanned in batch through digital copiers that are integrated in the company network. The created images are accepted by the biz²ScanServer. Through a barcode that is pasted on the document, the server allocates the document to the corresponding SAP process via ArchiveLink.

The technological basics for the future activation of modern OCR/ICR mechanisms are thereby realized. In addition to the mass scanning, the employees can also process single paper documents with a simple working place scanner. With the biz²Scanner, the scan happens within SAP R/3, also integrated in the SAP GUI. The usual SAP environment also guarantees occasional users an easy handling and therefore secures extremely short introduction times and training as well as fast work processes.

Business and a secure storage of the data in SAP DMS

With the last configuration level, the project employees can take over project-specific data as offline copies, too. With the biz²ExportServer, the user firstly performs a data selection directly in SAP, e.g. project number and period. Afterwards, the documents are output into a directory. For this purpose, the files are extracted of the biz²Archiver and a HTML navigation system is additionally set: Independent of the location, the user can now navigate through the document structure with any internet browser. The combination of the biz²Archiver with a DISC-Orion Jukebox for the long-term archiving thereby guarantees an almost maintenance-free business and a secure storage of the data in SAP DMS and ArchiveLink.

In both directions

Optima uses the biz²Office by inPuncto for the filing and archiving of MS Office documents in SAP R/3 DMS. It allows a bidirectional synchronization of SAP fields in Office documents. The allocation of Office documents to a SAP DIS (SAP document number) enables e.g. automated version corrections or a takeover of old data. To increase the comfort of handling, the user can deposit up to three SAP transactions in the biz²OfficeSynchronizer menu bar and therefore directly call them from the Office application.

Furthermore, the number of data that have to be entered could be reduced through individual adaptations. "Consequently, a simple and fast handling is guaranteed", Hanspeter Preissler explains. "An intensive optimization of the surfaces in close cooperation with the producer led the way." The application offers OPTIMA a special advantage at the filing of emails from Outlook: In addition to the search of attributes, emails also can be researched through the full-text search TREX in connection with SAP DMS.

Via biz²DragAndDrop, user file documents, whose host application is not supported by biz²Office. Instead of two sessions, the user works only with biz²DragAndDrop, here. An integrated explorer window simplifies the filing.

Through the consequent application of the inPuncto biz² ECM-Suite, the company possesses an optimized filing for different document types - linked with the corresponding SAP processes. The inconvenient selection of drives and directories with the aid of MS Explorer is omitted, scan processes happen in an efficient workflow, effective search functions secure a fast access.

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Learn more: [Solutions for Document Management in SAP](#)

[biz² ECM-Suite for Document Management](#)

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