Infor Document Management

Fully integrated end-to-end document management solution

Make sure you're always prepared for audit compliance

Finding the right document should be the least of your concerns. When you've aligned your documents with your business systems, you'll always have all of the information you need—securely stored in a searchable database. With Infor® Document Management, you can work with the most accurate and up-to-date information, while ensuring that everyone in your organization is working together. Infor Document Management is a central repository where you can maintain your common business rules for creating documents, as well as all of your documents.

Always have the right document

Infor Document Management (IDM) is a end-to-end document management solution, fully integrated with the ERP system that stores, secures, and tracks documents across the enterprise. IDM offers a single content repository, version control, and security governance to improve the document management process and increase efficiency.

Integrate all of your business content

With Infor Document Management, you can increase productivity by integrating all of your business documents with your core business processes inside your ERP system or business application. Infor Document Management uses soft links, based on document metadata, to provide you with tight integration between your documents and your Infor ERP system. You can view a document from within the context of your application, or click on a document link and Infor Document Management will retrieve the document from the central repository. Your documents will always be there—at your fingertips.

Manage the entire lifecycle of your documents

Storage

IDM allows businesses to store their documents in a centralized location, making organization and authorization easy for approved users. Organize folders by document type, date, or custom schema, allowing intuitive organization along with specific metadata/attributes for each document type. Search, send, sign, import/export, or lock documents within the IDM interface easily. Documents are stored and protected by role-based authorization to ensure the safety of your information.

Input

Automatically import documents from your ERP application, or any IDM client. Integration with products such as Microsoft Office, allows for easy template creation for adding documents to the repository. Automatically add, or update, metadata on import with document capture to further automate enterprise document management.

Share

IDM's role-based permissions offer a crucial mechanism to facilitate secure document sharing within and outside an organization. The system enables admins to assign specific roles to users, which determine their level of access to documents and features. This approach enhances security by ensuring that only authorized personnel have access to sensitive information.

IDM's document sharing feature enables authorized users to share documents efficiently within the company and with external parties electronically. The feature's simplicity allows users to send documents directly from IDM, eliminating the need to switch between applications.

Additionally, IDM supports the rapid creation of multiple documents by merging existing templates and data. This functionality can boost productivity and save time, allowing users to generate new documents without starting from scratch.

Share documents with each other within the company, as well as external parties. Send documents electronically from within IDM is just the click of a few buttons. IDM also gives you the ability to create many documents by combining previously created templates and data.

> **The fact that the documents no longer need to be entered manually into the system means huge time savings for us, especially for invoices and orders of many items."**
>
> NORBERT BENZER
> Business Process Manager, Mitsubishi Chemical Advanced Materials

Track

The IDM repository provides versioning and check-out/check-in capabilities, so you can be sure you're always working with the latest, most complete version of a document. IDM has also implemented digital signature capabilities in conjunction with DocuSign. Documents can be sent out for a digital signature and their status will be tracked on IDM appropriately, updating when the recipient has responded to a document.

Data handling at your fingertips

Automation

IDM integration with ION workflows allows for handling a document through its entire lifecycle. Upload a document and have it instantly locked down from any further changes or tampering. You can have it sent for manager approval and review, have the status of their decision be reflected on the document, and be notified of each step of the process and whether more work is required for the document or not.

Scan and Connect with a Standard Web Browser

Infor Document Management is powered by Ephesoft® Smart Capture™ Technology to give you optical character recognition (OCR) and intelligent character recognition (ICR) capabilities. These tools enable more complete and improved document capture processes, so you can scan and connect to your documents through a standard web browser—without having to install software on your laptop or desktop. Infor Document Management makes sure you can find the documents you need, so you're always working with the latest, most complete version of a document. With faster, easier access to all your critical business information in context, Infor Document Capture connects all of your documents directly to your core business systems to optimize your decision-making.

Get all the capabilities you need

- **Document organization**: The system allows users to organize their documents into folders and subfolders, making it easy to find the documents they need.

- **Document sharing**: Infor Document Management allows authorized users to share documents with other users within the company, as well as with external parties. This helps improve collaboration and communication within the organization.

- **Document security**: Security features ensure that only authorized users can access and view documents through access controls, password-protection, and document encryption.

- **Document version control**: Infor Document Management allows users to track different versions of documents, making it easy to see who made changes and when.

- **Document indexing**: The system allows users to index documents, making it easy to find specific documents using keywords.

- **Document workflow**: Infor Document Management includes a range of workflow tools that allow businesses to automate their document management processes, such as routing documents for approval, and tracking the status of documents.

- **Integration**: Infor Document Management can be integrated with other systems, such as enterprise resource planning (ERP) systems, making it easy to access documents from within other applications.

- **Storage**: Keep all documents in a centralized location making them easily accessible to authorized users.

- **Security**: Access controls, password protection, and document encryption keeps sensitive documents safe.

- All documents stored in a centralized location

- Workflow tools allow businesses to automate

- Seamless integration to access documents from within other applications

- eSignature included for speed and security

- **Organization**: Folder structure keeps documents organized and easy to find.

- **Sharing**: Document sharing from authorized users both internally and externally improves collaboration and communication.

- **Version Control**: Tracking changes across all users and versions makes it easy to see who made changes and when.

- **Indexing**: Improved search capabilities through keywords and document type.

- **Automation**: Workflow tools including document routing, approval, and tracking ensure critical steps are never missed.

- **Connect with 3rd party apps**: Allow third party systems permissions to access documents in other applications.

- **eSignature**: Go paperless with DocuSign integration and get contracts digitally signed.

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