



Document Management

for Microsoft Dynamics™ AX



Optimize Your
Document
Handling



Red Maple's Document Management extends the document handling available in Microsoft Dynamics™ AX. Users will benefit from integration with Microsoft® Windows® SharePoint® Services for a secure and scalable solution that is directly tied to records within Microsoft Dynamics™ AX. As a result, companies can benefit from the combined power of Microsoft Dynamics™ AX and Microsoft SharePoint.

Business Situation

Companies need document handling that is both integrated with its business management software and provides the power and scalability provided by cutting edge portal technology.

Solution

Red Maple's Document Management uses integration between Microsoft Dynamics™ AX and Microsoft SharePoint so companies can tie documents and features in Microsoft SharePoint with the records in Microsoft Dynamics™ AX.

Microsoft SharePoint 3.0 Integration

With Red Maple's Document Management, documents are stored within the Microsoft Windows SharePoint Services framework. Documents are automatically stored and retrieved using the Microsoft Dynamics™ AX user interface. However, instead of storing your documents in one logical folder, documents can be stored in any number of document lists and locations, allowing users to store and retrieve documents with one of the most powerful document handling solutions on the market.

Security

Microsoft Dynamics™ AX's current document handling allows all users to view any document stored within the environment. Red Maple's Document Management combines with Microsoft Windows SharePoint Services to deliver a more robust and secure environment where users only have access to documents that they have permission to view. As a result, sensitive information is only available to the users who need to see it.

Top Down Organization

With Red Maple's Document Management, users now have multiple options for viewing documents. Documents can be viewed in Microsoft Dynamics™ AX and within SharePoint's Web interface, as well. As a result, employees may browse information more readily and may even search the information available using SharePoint's Search services.



Contextual Document Handling

Standard Microsoft Dynamics™ AX allows for documents to be attached to individual records. Consequently, notes and manifests for a sales order need to be attached to the individual sales order in order to maintain the logical link. With Red Maple's Document Management, documents can be contextually stored, so that information pertaining to a customer's order can be viewed at the order level and at the customer level. Likewise, you can assign an item to a customer that will then display through any future contextual record such as a sales order. Contextual document handling allows for better organization and minimizes searching for the correct document.

Flexible Metadata

With the power of Microsoft SharePoint, descriptive data can be attached to individual records to facilitate the organization of information and to allow for easier searching within Microsoft SharePoint.

Facilitate Collaboration

With Microsoft SharePoint and Microsoft Dynamics™ AX, collaboration has progressed. If your team needs to view and store documents and notes based on an item in Microsoft Dynamics™ AX, Red Maple's Document Management provides a powerful integration to both products so teams can collaborate within Microsoft Dynamics™ AX or within Microsoft SharePoint.

Upgrade Tools

Document Management is available for Microsoft Dynamics™ AX versions 3.0, 4.0 and 2009. Included with Document Management is a utility to convert documents referenced in Microsoft Dynamics™ AX into documents handled within Microsoft Windows SharePoint Services. As a result, Document Management can provide benefits immediately.

Conclusion

For more information on Document Management, contact your Microsoft Dynamics™ AX partner or visit us on the internet at www.redmaple.com.

Quick information



What Modules are Required?

Microsoft Dynamics™ AX
Microsoft® Windows® SharePoint® Services



Are you on the Internet?

More information about our products can be found at www.redmaple.com.



Who do I contact to get a demonstration or purchase?

Contact your Microsoft Dynamics™ AX partner for pricing, demonstrations and purchasing information.

