■ Workflow for Archive.One ■

Posteingang

Paper scan

E-Mail

Incoming FAX

Decision over document type

Invoice

Purchase order

Correspondence

Sales quotation

Automatic control through workflow

Decision Forwarding

Decision

Processing/Editing Decision

Processing/Editing

Archiving
SQL-Database
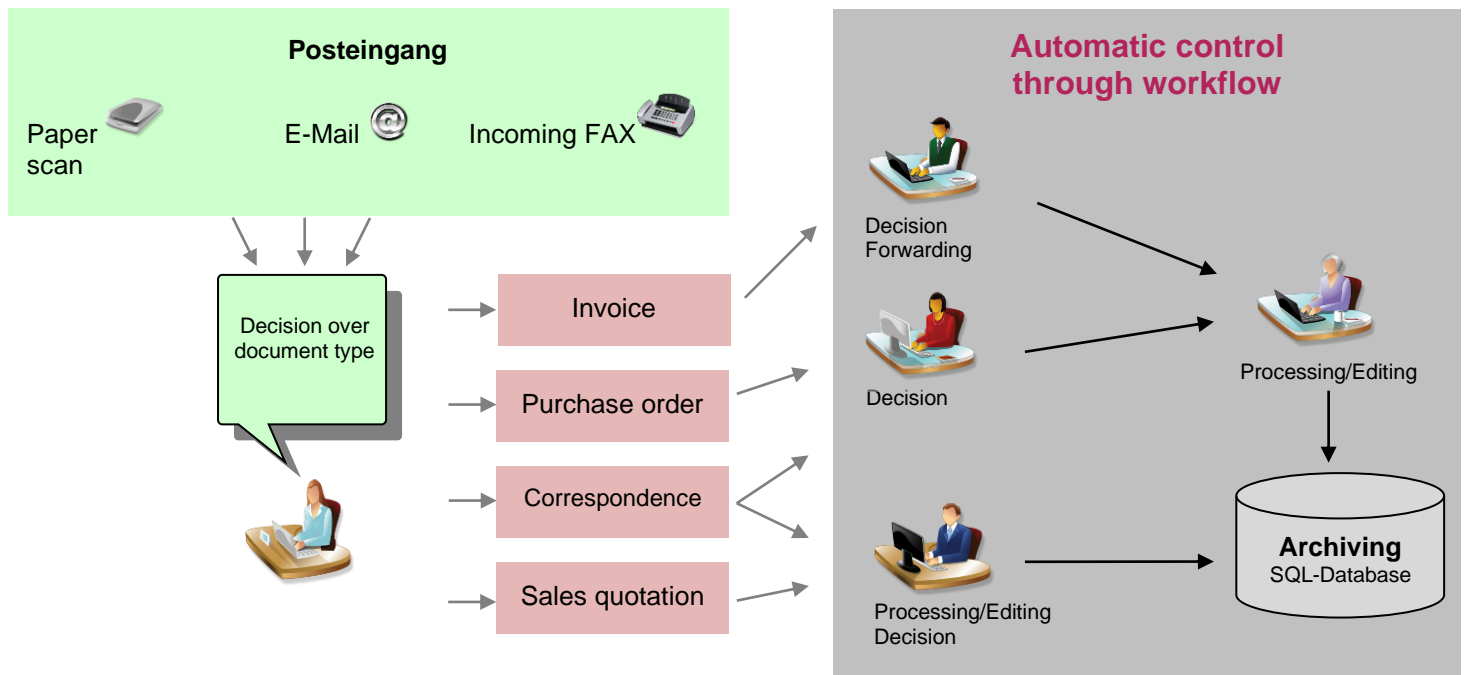
You should ask yourself:

What is meant by workflow?
In absolutely every company there is a multitude of "workflows". These are work processes and decision-making channels that every employee should follow. For example, there are rules (spoken or unspoken) about what must happen to an incoming invoice. All steps after opening the envelope, through distribution in the company, invoice verification and approval, to posting and storage in the archive are known as a "workflow".

What is an electronic workflow?
In an electronic workflow system, existing rules, work steps to be followed and approval paths can be defined. If a "procedure" then enters the workflow system, it ensures that all necessary and optional steps are adhered to. Deviations, such as time overruns, lead to notifications/escalations.

What is the advantage of electronic workflow systems?
For example, an electronic workflow system can ensure that all required work steps within a process (procedure) are actually adhered to. It is not always necessary to rethink what to do and who to inform. This reduces possible sources of error. Mail is distributed in the workflow system, so that after scanning incoming documents, for example, only the decision on the type of document - e.g. incoming invoice, customer order, quotation - has to be made.
Time-consuming and costly copying and multiple distribution of incoming documents is also completely obsolete.

In addition, a workflow system helps to maintain an overview of the documents in circulation and to comply with times / deadlines, for example in order to be able to pay within the discount tolerance.

What are the benefits of this Novaline solution?
With Workflow for Archive.One, Novaline has developed a powerful and flexible workflow system especially for the requirements of small and medium-sized companies, which is easy to install and learn without much effort. Preconfigured elements simplify the setup and definition of workflows. An "external workflow designer" supports the user in creating such workflows. The interface is of course designed in the same way as in SAP Business One and Archive.One and is therefore familiar to the user.

What are the advantages of automatic document recognition?
Once documents (order confirmations, delivery bills, invoices) have been received, they are analyzed. First, the vendor is determined, then the article lines and finally the document totals (if available). Line cross totals and document end totals are checked mathematically and the read document contents are displayed on the screen. Discrepancies are highlighted in color and can be corrected manually. With a mouse click on "Enter SAP" the data is transferred to the SAP Business One dialog "Incoming Invoice" or "Order Confirmation". The document is then forwarded to the next processing step under workflow control. These processing steps are displayed with the help of the workflow designer and can be individually designed.
With the help of the substitute rule, processes can be automatically forwarded to the substitute in case of absence.

SAP Partner

↗ **NOVALINE**

■ Features Workflow for Archive.One ■

System requirements

- Client: Windows 8.1©, 10©, 11©
- Server: Windows 2012©, 2016©, 2019©, 2022©
- Database: MS SQL-Server 2014©, 2016©, 2017©, 2019©
- License Novaline Archive.One
  (min. 1 workstation license, min. 1 extended workstation-license, Scanmonitoring, OCR text recognition Omnipage™)

Workflow Client

- Administration incl. sophisticated rights system
- Definition of workflow process types and masks
- Definition of any number of document-oriented workflows
- Workflows in any number of stages (e.g. from employee 1 to employee 2, to employee 3, until completed)
- Creation of user-defined fields
- External workflow designer
- Graphical representation of workflows for easy overview
- Automatic reaction of workflow to Archive.One data
- Use of macros
- Escalation function, substitution regulation
- Overview of active workflow processes
- Interface for completing incoming workflow tasks with display of the relevant document
- Approval/rejection of tasks
- Inquiry about tasks
- Workflow history (who did what and when on the document)

Additional modules
Document recognition for delivery notes *.
(Prerequisite: OCR text recognition for Omnipage TM)

- Analysis of the contents of delivery notes from Archive.One
- Determination of suppliers from SAP Business One by comparison with stored supplier master data
- Determination of delivery note contents
- Display of delivery note items in a table to be edited manually
- Possibility to extend the table contents of invoice lines recognized via OCR by user-defined information (fields) such as cost center/carrier, check notes, etc.
- Possibility of supplementing/correcting the document contents not or incorrectly determined by OCR recognition
- Possibility of vendor-specific document definition for incoming documents that are not automatically recognized
- Comparison with the order from SAP Business One possible
- Determination of your own article number via the supplier article number data from SAP Business One master data, if the latter is stored
- Transfer row content to SAP Business One goods receipt screen (for goods invoice)

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Document recognition for incoming invoices
(Prerequisite: OCR text recognition for Omnipage TM)

- Analysis of the contents of invoices
- Identification of suppliers from SAP Business One by comparison with stored supplier master data
- Determination of invoice line contents with automatic cross-counting
- Control of the invoice total by adding up the values recognized by OCR
- Verification for compliance with the invoice formalities § 14 UStG
- Display of invoice items in a table to be edited manually
- Extension of the table contents of invoice lines detected via OCR by user-defined information (fields) such as cost center/carrier, audit reports etc.
- Possibility of supplementing/correcting the non-respectively incorrectly determined document content by OCR detection
- Possibility of defining supplier-specific documents for incoming documents that are not automatically recognized.
- Comparison with the order from SAP Business One possible
- Differentiation between service and goods invoice
- Determination of own article number via supplier article number data from SAP Business One master data, if the latter is stored
- Transfer row contents to the SAP Business One booking mask (for goods invoice)
- Transfer the final sum to the SAP Business One booking mask (for service invoice)

Document identification for order confirmations
(Prerequisite: OCR text recognition for Omnipage TM)

- Analysis of the order confirmation from Archive.One
- Identification of suppliers from SAP Business One by comparison with stored supplier master data
- Determination of the line contents of the order confirmation with automatic cross-calculation
- Control of sums by adding up the values recognized by OCR
- Display of the positions of the order confirmation in a table to be edited manually
- Expansion of the table contents of order lines detected via OCR by user-defined information (fields) such as test notes etc.
- Possibility of supplementing/correcting the non-respectively incorrectly determined document content by OCR detection
- Possibility of supplier-individual document definition for incoming documents that are not automatically recognized
- Comparison with the purchase order from SAP Business One possible
- Determination of own article number via supplier article number data from SAP Business One master data, if the latter is stored
- Line contents transferable to SAP Business One order mask, if the purchase order does not exist.

* for incoming documents in decimal currency with hundredths division, except for handwritten documents, stamped and/or handwritten documents as well as documents that cannot be recognized by OCR due to their nature or (print/scan) quality. The same applies to PDF documents that are write-protected by password.