



# smart-plm [documents]



## Flexible and intuitive document management within SAP

BY SMART-PLM AIGNER GMBH & CO. KG

### Key features of smart-PLM [documents]

- Manage documents in a structured way directly in SAP, presented in the familiar look&feel of Windows Explorer.
- Display and maintain all relevant documents and the corresponding metadata on a central screen, including preview functions.
- Create documents by drag and drop, e.g. from the Desktop or Windows Explorer.
- Check of duplicates during the document creation process.
- Edit office documents directly in SAP.
- Create versions of documents and release them.
- Use template functions for documents or folder structures.
- Powerful and highly flexible search capabilities across:
  - document metadata (e.g., document type, status, creator, etc.)
  - the classification of the document (or associated material)
  - the metadata of the associated objects (e.g., equipment, materials, etc.)
  - usage of documents as production resources in plans and orders
- Use global and user-specific selection variants for reusable search scenarios
- Create ad-hoc workflows for document review and approval processes
- Create and download document, folders, and multi-level folder structures as ZIP file
- Import of Emails from Outlook
- Send emails from SAP with document attachments or as direct link
- Organize documents and folder for yourself using favorites.
- Use subscription and notification features
- Assign authorizations for specific documents and folders (including authorization inheritance)

## Advantages

Navigation within folder structures, extensive search capabilities, and efficient document maintenance, all within a single powerful transaction.

A few clicks – everything at a glance

Windows Explorer look &feel

Drag and drop from Windows Explorer to SAP to transfer single documents or complete folder structures.

Functions for editing documents (e.g., renaming, moving, copying...) similar to Windows Explorer

"Thinking in records"

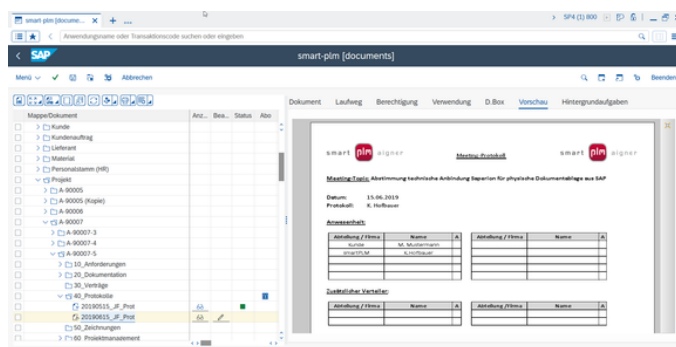
Maintain documents and records in relation to specific SAP business objects (material master, equipments, customer, ..) using our application's integration into the generic object services.

Automated generation of object records for any SAP object (e.g. project records, supplier records, equipment records,..)

Simple template management of documents and folder structures

## Technology

- SAP GUI (ABAP) application, as contemporary web technologies are inadequate for "power applications."
- The user interface is optimized for the SAP Fiori Theme (not mandatory).
- Open architecture for extensive customer-specific customization
- On-premises installation – no cloud
- Future-proof database utilizing SAP standard objects, including document information records and classification.
- S/4HANA ready
- Available from SAP Basis Release 7.40, SP09.



## Interface extensions to smart-PLM[documents]

### SharePoint Online

- Our SharePoint Online interface enables the synchronization of SAP documents or entire folder structures, along with their contained documents and metadata to SharePoint Online.
- SharePoint Online users can access SAP documents without requiring SAP access.
- After document transfer to SharePoint Online, a permanent system connection is no longer required.
- All functionalities and features of Microsoft SharePoint Online are accessible, including the ability to share individual documents with external users, embed Office documents within SharePoint Online sites, and utilize the integrated full-text search.

### Adobe Sign

- Our Adobe Sign interface enables an automated exchange of SAP documents with Adobe Sign.
- Manual upload and download processes between the two systems are now obsolete.
- Initiation and monitoring of signature processes take place directly within SAP.
- This substantially diminishes the effort required from users and enhances acceptance.

### Microsoft Teams

- Our Teams interface provides direct access to SAP documents to a MS Teams group.
- Each member of the team has read/write access to the relevant SAP documents.
- Integrated as an additional tab within MS Teams authorized users can access the SAP documents.

**Stephan Odenthal, Head of the Design Department and Engineering Services at Körber Pharma Inspection:**

*"Upon the implementation of SAP, we swiftly recognized that the provided DMS standard did not meet our needs."*

*"Throughout the discussion, we recognized that our requirements were thoroughly understood. With the technical expertise of the smart-plm consultants, we successfully implemented a customized solution."*

*"Many colleagues expressed skepticism regarding the implementation of SAP, particularly concerning its usability. However, the smart-PLM[documents] add-on has demonstrated its effectiveness:*

*The solution is legally compliant, time-efficient, and has received widespread acceptance."*