P8 Navision Connector

Fairfax
Data Systems

Seamlessly integrate FileNet P8 with Microsoft Navision Attain to speed data entry and document retrieval.

In Brief:

The P8 Navision Connector enables you to use FileNet P8 as the entry point for vendor invoices, customer purchase orders, travel expense forms and other supporting documents that are processed through your AP/AR departments. Use P8 to perform data entry and approvals, and connect to Navision Attain to perform validation and automatically create new Navision check vouchers or Sales Orders.

From within Navision Attain you can view the original vendor invoice, customer purchase order or other document stored in FileNet. This is with the "View Document" button associated with a transaction within Navision.

Deploying a content management system within Accounts Payable or Accounts Receivable requires careful implementation planning and extensive integration in order to make AP/AR documents accessible from every desktop while minimizing data entry requirements. P8 Navision Connector makes it possible to successfully deploy FileNet P8 in AP/AR departments that use Microsoft's Navision Attain financial management package.

The Challenge

Users typically perform data entry into Navision off of paper documents, such as vendor invoices and customer purchase orders. Frequently, these documents are later needed within customer service or AP/AR to service customer/vendor inquiries, or validate data entry. Imaging the documents and storing them in a FileNet P8 Object Store makes them concurrently available from multiple desktops, but:

- ☐ How do you reduce duplicate data entry (data-entering a check request or sales order, for example, into FileNet and into Navision)?

- ☐ What retrieval keys associate documents in FileNet with Navision records?

- ☐ Can documents stored in FileNet be viewed from within the Navision Attain application?

The Fairfax Solution

These questions have been fully addressed with the development of the P8 Navision Connector. With P8 Navision Connector data entry is performed from a single application that creates a Navision check voucher and also sends Navision the FileNet Object Id of the associated document.   From within the Navision application, an associated "View Document" button displays the document in a browser window.

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FileNet P8 as the Entry Point

With the P8 Navision Connector, FileNet P8 can be the entry point for documents – whether these are scanned images, XML documents, eForms or other electronic documents. This makes vendor invoices, customer's purchase orders , etc., electronically accessible early in the document lifecycle. Also, workflow can electronically route documents for approval.

Data Entry

Adding a vendor invoice, for example, to the FileNet Object Store queues the document for the "Enter Vendor Invoice" step. This step allows multiple users to view vendor invoices while performing data entry. "Enter Vendor Invoices" communicates with Navision via Transaction Manager to assist with data entry (such as retrieving pick lists i.e.. vendor name) and to perform validation.

Creating the Navision Check Voucher

"Enter Vendor Invoices" sends the data via Transaction Manager to Navision, creating a new check voucher in Navision. The data sent to Navision includes the FileNet Object Id, uniquely identifying the vendor invoice image.

Document Retrieval

From within Navision, a user selects a button to view the vendor invoice associated with a check voucher. The image is displayed in a browser-based viewer.

System Requirements:

- Microsoft Navision Attain 2.7 and higher
- FileNet P8 Content Engine or FileNet P8 Image Manager 2.01 and higher.
- Transaction Manager. Transaction Manager is a product of Digital Vantage Point that facilitates real-time interfaces to Navision.
- MSMQ 2.0 and higher.