

WORKFLOW DATA IMPORT MANAGER



Key Benefits

- Enhanced import capability
- Improved productivity
- Import integrity
- Customised import function
- Automated email notification
- Automated task scheduling
- Full audit trail with drilldown
- Comprehensive error reporting



Data Import Manager for Greentree®

Traditionally data file importing from disparate or legacy systems has proved a headache for managers with time-consuming running and rerunning of scheduled imports, errors and limited ability to manipulate data. Greentree has an intelligent interface tool that allows for fail-safe data integration and consolidation.

Data Import Manager for Greentree automates data file imports from non-integrated systems. The interface manager has an advanced Workflow functionality that allows users to schedule regular imports of both masterfiles and transactions including invoices, orders, receipts and journals as well as a myriad of master record types. The format of the imported data file can be configured within Greentree thereby eliminating program changes and providing a flexible platform rather than a rigid fixed format. Of course all imported data is processed through Greentree's business rules to ensure that it is both consistent and valid.

Data Import Manager for Greentree allows administrators to manage the integration of data into Greentree with a

number of powerful tools to maintain, schedule and view the data transfer process effortlessly.

Enhance your data import capability

Companies produce a variety of data in a variety of forms across their network and systems, which may or may not be fully integrated. Additionally, companies often receive data from third party external sources which must be imported into their accounting and business systems. Easy access and integration of this information is critical to the efficient and accurate processing of data, but can be problematic for many organisations.

Data Import Manager is a flexible tool that lets users choose single or multiple files to import, specify file types,



"Very, very responsive!"



define, create and assign new file directories and names, import attachments and save log files from one user-friendly screen.

Improve productivity

Data Import Manager can improve your organisation's productivity with fast access to non-integrated data for processing. The Import Manager also allows users to schedule regular imports of data automatically, decreasing the amount of time employees devote to the task of importing and integrating data. Automatic email notification will inform staff on success and completion of import activity with log files if required. Scheduled import progress can be easily monitored at any time.

Be confident imported data is accurate and consistent

Options are available within Data Import Manager to manage error warnings and logs, with the ability to define the error threshold settings and abort import on reaching the error limit to maintain the integrity of imported data. Your

company can be confident that imported information is accurate and consistent with company defined standards. Users can receive email notification of any errors in data import with the attachment of any relevant log files.

Customised import function

Staff can customise data import requirements to suit company templates and manipulate information through translation tables before import into Greentree data fields. This allows for the elimination of unnecessary data pre-processing and ensures that company standards for information documentation and storage are maintained ensuring consistency across the organisation.

Complete audit trail of import activities

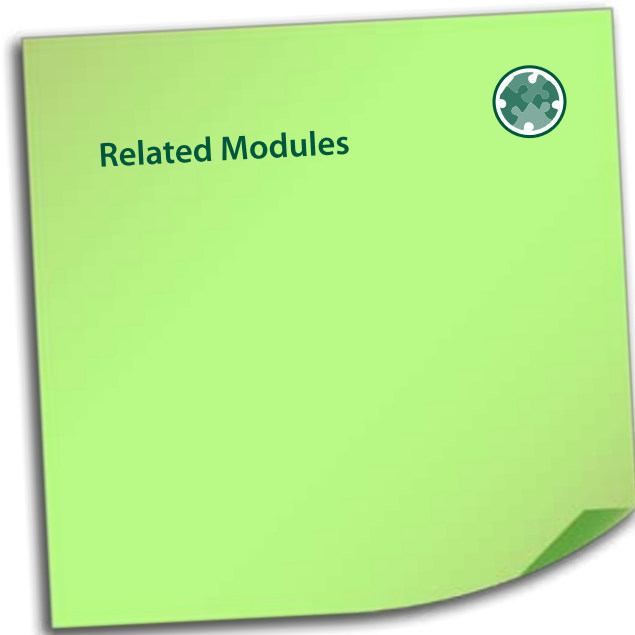
Data Import Manager provides a complete audit trail of data import activities. Users can check all imported transactions and review individual schedules, notifications, logs and linked records.

"Greentree allows us to integrate all areas of our business in a way that we would not have expected possible in a product aimed at SME's."

David Goodwin, Group Financial Controller - The PA People

"Very, very powerful!"





Import Word and Excel documents and images

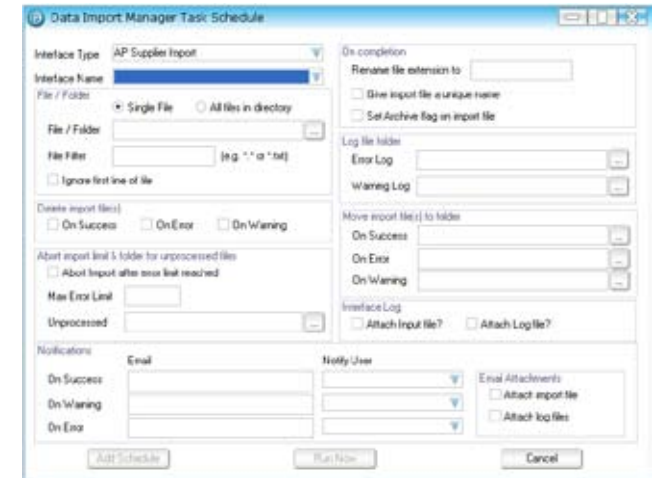
Data Import Manager allows for Word documents, Excel documents and graphical images to be imported and linked to records within Greentree.

Data Export

Users can export certain key masterfile data to allow third party systems to validate their own data prior to sending data to Greentree. The Interface Setup allows a flexible choice of what and when the data is to be exported .

Integration with other Greentree Modules

Greentree’s modular system builds upon and integrates with all other modules to ensure that every drop of business intelligence is extracted from every transaction right across the business – nothing goes to waste. This trans-



lates into aggregated business value and you need only purchase the modules that best fit your business.

Data Import Manager integrates with core Greentree modules to optimise data resources 'live' environment.

Data Import Manager integrates in real-time with most Greentree modules including:

- Financials Management
- Job Costing
- Supply Chain & Distribution
- Customer Relationship Management

Key features

- **Interface maintenance** is an easy-to-use, highly configurable function that allows the user to establish extensive parameters that can be applied to data files for import. The screen makes it easy to customise import



“Very, very integrated!”



requirements and specifications for timely and accurate record integration.

- **Automated email notification** Data Import Manager for Greentree gives the user the ability to send automatic email notification to specific staff on success, warning of error on data file import and allows for the attachment of import and log files with the email notification.
- **Automated task scheduling** Data Import Manager supports user-defined settings to schedule routine import tasks to run automatically freeing managers from time consuming manual administration. The automated scheduling process helps streamline the data import process and increase workflow efficiency.
- **Data mapping** Data Import Manager has a data mapping function so it does not rely on a fixed format. It provides translation of actual data values during import.

- **Review log** The Data Import Log is a powerful enquiry utility to review all scheduled task summary information. The log allows users to review transaction type, name, status, date and time of scheduled task, errors, warnings, value and user and to review individual schedules, notifications and linked records.
- **Reporting of data imported** Each data type has an associated report, which is fully user customisable. This allows end users to print a report of the data imported for audit and reconciliation purposes.
- **Secure information transfer environment** Data Import Manager for Greentree respects standard user database validation rules and user security functions, restricting the transaction types and masterfiles that can be accessed for import and export schedules.

“The new functionality we have in Greentree has opened our eyes to how we do things. We have seen significant productivity gains using Greentree and in fact saved one day a week for one team member in this area.”

Andrew Neville, Manager of Finance & Administration

- Centacare Catholic Family Services





“Very, very integrated!”

Greentree is modular, with all business functions totally **integrated**. This provides you with a wide variety of modules and sub-modules that afford options rarely found in other packages. You purchase the pieces that you need, effectively matching the system to fit your business. Choose from: Financials, Job Costing, Supply Chain & Distribution, Manufacturing, Human Resources, Customer Relationship Management (CRM), Service & Asset Management, Business Intelligence, Retail, Workflow - Business Process Management and eBusiness.

Greentree is a solution, readily adapting across a broad range of industries and business types. Businesses are provided with a **powerful**, extremely cost-effective system that has consistently proven itself capable of managing change and growing business potential.

With simple, smart thinking at your fingertips, Greentree provides the ultimate seamless business-building environment. Exploit its accuracy in business metrics, challenge its capability to deliver empowering information. Rely on the one highly **responsive** solution to efficiently streamline your internal processes resulting in increased manageability and productivity across all areas of your enterprise.

What’s the difference to any other software solution? Greentree is the most responsive business software product available, providing a source of competitive advantage to help you drive your business to the next level!

