

OpenText™ Active Documents

Gain complete visibility and control over your B2B transactions

As the global leader in B2B integration services, OpenText understands the importance of complete end-to-end document visibility and the role it plays in effectively managing your business.

Clear visibility over your B2B transactions is more critical than ever in a globalized, competitive, and increasingly complex marketplace. A lack of visibility over your B2B documents makes it difficult to recognize issues that can slow down your business, leading to lowered customer satisfaction and lost revenue.

As your B2B transactions increase and become more complex, it can be difficult to keep up with activities and errors that need to be addressed. In addition, non-activity issues are easily missed, such as not receiving an advanced shipping notice for an order you expect. These cases may be managed successfully if you are alerted early.

Not having early visibility into these types of potential issues means more work to track down and address problems once they have occurred. But how can you stay on top of every exception when you are busy with the day-to-day?

OpenText Active Documents

Active Documents provides complete, end-to-end lifecycle visibility and management of your B2B transactions. With customizable reporting, you can spot and manage issues before they affect your business—improving the speed and accuracy of information.

Its features are easy to use without requiring IT support or technical knowledge, such as EDI, enabling you to take control of your transactions, so you can manage by exception and focus on your core business. It is all at your fingertips as an integral component of the OpenText™ Managed Services and OpenText™ Trading Grid™ Messaging Service offering in Trading Grid Online.

Active Documents provides many valuable features and capabilities:

1. **Real-time status dashboard**—Gain a clear view over your B2B transactions and quickly detect all EDI and XML documents with processing errors so that no orders, invoices, or payments get lost in translation. You can ensure data quality and compliance with timely “track and trace” data needed to monitor in-flight transactions. The user interface includes summary-level dashboards so you can easily identify trading partner performance and transaction volume trends.

END-TO-END VISIBILITY AND ANALYTICS

TRANSACTION DASHBOARD

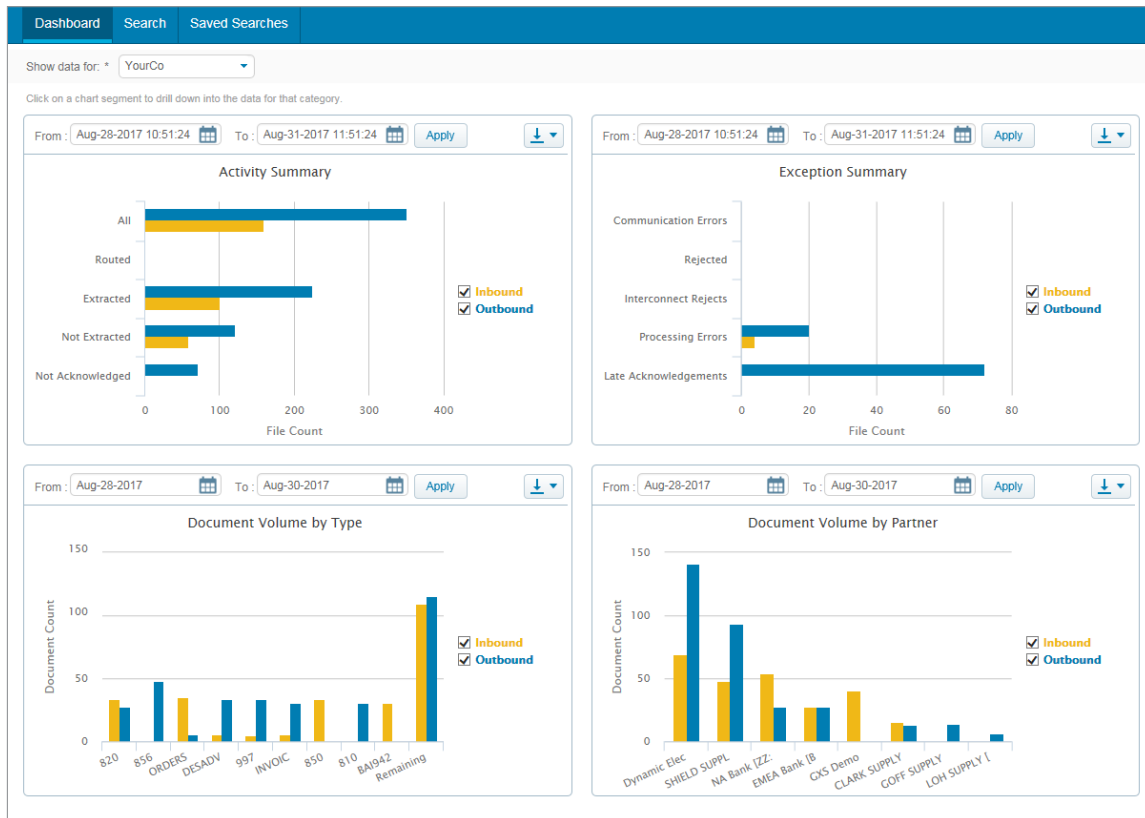
- Activity summary
- Exception summary
- Document volumes—by document type, by trading partner

INTELLIGENT DOCUMENT SEARCH

- Locate documents by document type, primary key (e.g. PO#, Invoice #), multiple criteria
- Label and save searches
- Detailed view for each process step in the lifecycle—communication, messaging, routing including interconnect status

REPORTING CAPABILITIES

- View on screen, save in PDF or CSV
- Customization with powerful filtering and sorting, field selection
- Automated scheduling and delivery



Active Documents dashboard in Trading Grid Online

- 2. User-friendly Business Document Viewer**—Intuitive and simple to use, no technical knowledge is required to use Active Documents. With the Business Document Viewer, B2B transactions are presented in a logical, human, readable format.
- 3. Self-service enhanced alerts**—Never miss a deadline to send an ASN or be notified when your largest customer sends you a purchase order. With enhanced alerts, you choose what is important to your business and be notified in real time on important activities, non-activities and errors.
- 4. Robust search function**—Need answers now? Quickly access information about any inbound or outbound document or B2B business process through a web browser interface. The Active Documents search function provides the ability to set search criteria in the file, interchange and document level, and allows you to save your frequent searches for those times you need immediate answers.
- 5. Customizable reporting**—Any search criteria available in Active Documents can be used for scheduled or ad-hoc reports. Set up and save your own custom reports without requiring internal IT resources and export data to PDF or CSV file formats for additional reporting and analytics.
- 6. Mobile access anytime, anywhere**—Network-based services can be accessed on the go via a mobile application. The Active Documents app provides mobile access to search and view transactions, including lifecycle information, so you can identify exceptions early and take corrective action as required.

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