



ClearView EDM (Enterprise Document Management) - The One Platform Archive Solution for Legacy Enterprise Resource Planning (ERP) Systems.

Contrary to what vendors may advertise, there is not a “silver bullet” solution for every legacy ERP system. A successful ERP archive requires careful planning and execution.

Trinisys’ proven archival process is based on best practices we have learned from archiving hundreds of systems, securely and efficiently. Our team considers the unique usage and dependent business practices of each client, then formulates a strategy to sunset the source system while identifying and archiving everything clients need to support ongoing workflows.

Keys to Successful ERP Archive:

- Define existing ERP assets (i.e. reporting tools, customizations, data volumes, etc.)
- Identify the user groups (key stakeholders) who will be making the decisions based on the ERP data
- Interview and catalog the use case for each legacy system
- Requirements are documented, engagement efforts and costs are finalized, and the SOW and project plan are updated based on the accurate information

ClearView EDM preserves administrative data from legacy systems related to general ledger (GL), human resources (HR), payroll (PR), materials management (MM), and accounts payable (AP) reports in an easy to access and organized archive, allowing organizations to retain employee records, consolidate data, and eliminate maintenance associated with the legacy system.

ClearView EDM Delivers:

- Legacy System Raw Data Extract - created and hosted in the Cloud and can be used for additional BI tool integrations post-archive
- Indexed Document Archive - a complete indexed set of legacy system documents and records is converted, archived, and made available in ClearView Historic Record Viewer portal - integrated with your directory services
- Data Migration Professional Services - our experienced team made up of data analysts, data engineers, and project managers guide clients through each phase and perform all of the heavy lifting
- Hosting and Support Services - Trinisys manages the secure cloud environment provisioning and performs ongoing administration (patching, backups, S3 bucket and database management) and support services

Benefits:

- Search-friendly archives that are indexed to enable rapid search and retrieval
- Controlled data access with role-based views and reportable audit trails
- 256-bit AES encryption protects data in motion and at rest
- Browser-based with zero footprint that is cloud hosted and available 24/7
- Works with other ClearView modules including clinicals, financials, HIM, blood bank, etc.

Document Search

Document Group: Ormed - HR

Document Type: HR - EE Incidents

INDEX	COMPARATOR	VALUE
1 Employee ID	Starts With	
2 Last Name	Starts With	d
3 First Name	Starts With	
4 Report Date	Between	11/01/2020 12/20/2020
5		

DOCUMENT_TYPE	UPLOAD_DATE	REFERENCE_COUNT	EMPLOYEE_ID	LAST_NAME	FIRST_NAME	REPORT_DATE
<input checked="" type="checkbox"/> HR - EE Incidents	07/06/2022	0	88877	Doe	Jane	12/12/2020
<input checked="" type="checkbox"/> HR - EE Incidents	07/11/2022	0	554433	Doe	Janet	12/01/2020
<input type="checkbox"/> HR - EE Incidents	07/11/2022	0	77550	Douglas	Kim	11/06/2020
<input type="checkbox"/> HR - EE Incidents	07/11/2022	0	65433	Donaldson	John	12/19/2020

For more information about ClearView EDM, or other Trinisys solutions, please contact Adam DesPres, Sales Director, at adespres@trinisys.com or 629-218-0642.