



Managing documents

Introduction

Documents form an essential part of a corporate knowledge store and Workspace has its own context sensitive Document Management facilities built-in. Global searches across document pools are simple and fast because of the integrated search tool. However the system encourages a far smarter way of working as documents are referenced against related records in the system. Whether looking at an enquiry, project, organisation or contact record, a user will always be able to see all the associated documents, drawings, images and emails at a glance.

Main features

- The 'Check-in / Check-out' facilities ensure that no document can be modified by more than one person at the same time. A simple flag indicates if another user has a document checked-out, in which case the document is only available to other users read-only.
- All document versions are maintained by the system providing a full history of how the document got to its current state, who created each revision and when it was published.
- Documents can be flagged as deleted but are not removed from the system. Users or administrators can 'recycle' them if necessary.
- An audit trail keeps a check of who has opened a document, whether they are internal or external to the business.
- Intelligent document creation allows users to create documents from a library of templates. By initiating the document creation from a record in the system e.g. Project, Contact, Organisation, meta data is captured to simplify the documents publication.
- The alerts system notifies users of additions or modifications in document areas they are 'subscribed' to, either for specific projects or globally across the system.
- Workspace allows email enabled scanners to scan documents directly into the Document Management system without further user intervention.
- Document baskets allow the user to collect documents from anywhere across the system and subsequently download, zip or email them as a batch.
- Any document can be forced through an approval route before becoming available in the system. The approval processing is provided by the standard Workspace Approvals engine.
- The powerful 'check-in' wizard allows single or multiple documents to be published, emailed to relevant users and linked to actions in a single process.
- A bulk publishing tool allows batches of uncategorised documents to be categorised as new versions of existing documents using a rapid entry, grid-style display. This is particularly useful when processing incoming batches of drawings.
- Alternative document searching screens are provided allowing the user to either drill down through to full document detail via links on the search page or navigate using a familiar Windows Explorer style interface where only basic details of a document are shown.

Who uses it?

Document Management is a fundamental part of the core Workspace system. It is used by every Workspace user to create, store and search for every document either created within the business or received by the business. It provides one place to go to see the full history of documentation concerning contacts, enquiries, projects or organisations. Compared to traditional standalone solutions, it provides an integrated, intuitive approach to the problems of both storing and finding documents.