



Document Management

Overview

Company-wide, centralized document administration using OMNITRACKER Document Management:

- Quality control of business processes in the organisation via retrievability, history and archiving of documents.
- Workflow that covers the entire document life cycle.
- Supports version management of documents.
- Structuring of documents by creating own directory structure.
- Role-based permissions concept on document and directory levels.
- Avoiding conflicts during document processing.
- Export of documents in SharePoint lists and to external file systems.

General

- Plan, create, review, release and publish documents
- Create directories and subdirectories
- Role-based permissions for directories and documents (reader, author, reviewer) ensures data privacy and information security.
- Prevent obscurities about document validation and conflicts by changes done in parallel
- Export of documents to SharePoint lists
- Integration with other OMNITRACKER applications

Interface and display

- Search capabilities
- Filter capabilities
- Colour display of document states

Planning and management

- Folder-based storage structure
- Managing document versions
- Mirroring on external file systems (shared network file systems)

Processing and monitoring

- Workflow-based escalations
- Define state transitions
- Automated email notifications (e.g. request to review)
- Role-based permissions concept (definition of authors, reviewers and readers for directories and documents)

- New directories and subdirectories are created and modified by members of the group "DocumentMgmt Managers":
 - Definition of directory name
 - Definition of parent or sub directory
- By defining parent and sub directories the directory structure is created.
- Definition of authorized persons for the documents within the directory:
 - Authors
 - Readers
 - Reviewers

01. Directories General Information X

Directory

Properties

Number: Dir-000002 Last Change: 05.11.2013 07:50:41 Created: 18.08.2009 14:47:18

Directory name: General Information

Parent directory: Directories State: Active

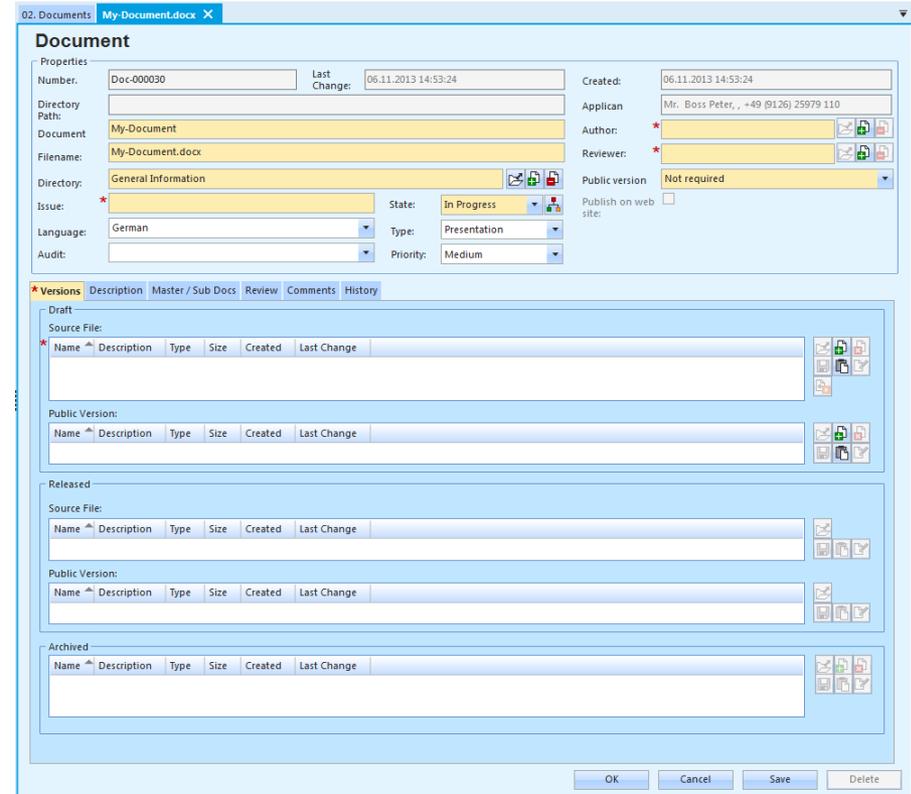
Documents

Number	Document title	Filename	Version	Verzeichnis
Doc-000001	GER-Glossar	Glossar.doc	1.0	General Information
Doc-000009	ENG-Glossar	Glossar.doc	1.0	General Information

Inherit roles

OK Cancel Save Delete

- Members of the group "DocumentMgmt User" can create new documents. This requires that they are authors of the corresponding directory.
- Each document is assigned to a directory.
- New documents can also be created from within a directory.
- Within a document older versions are archived.

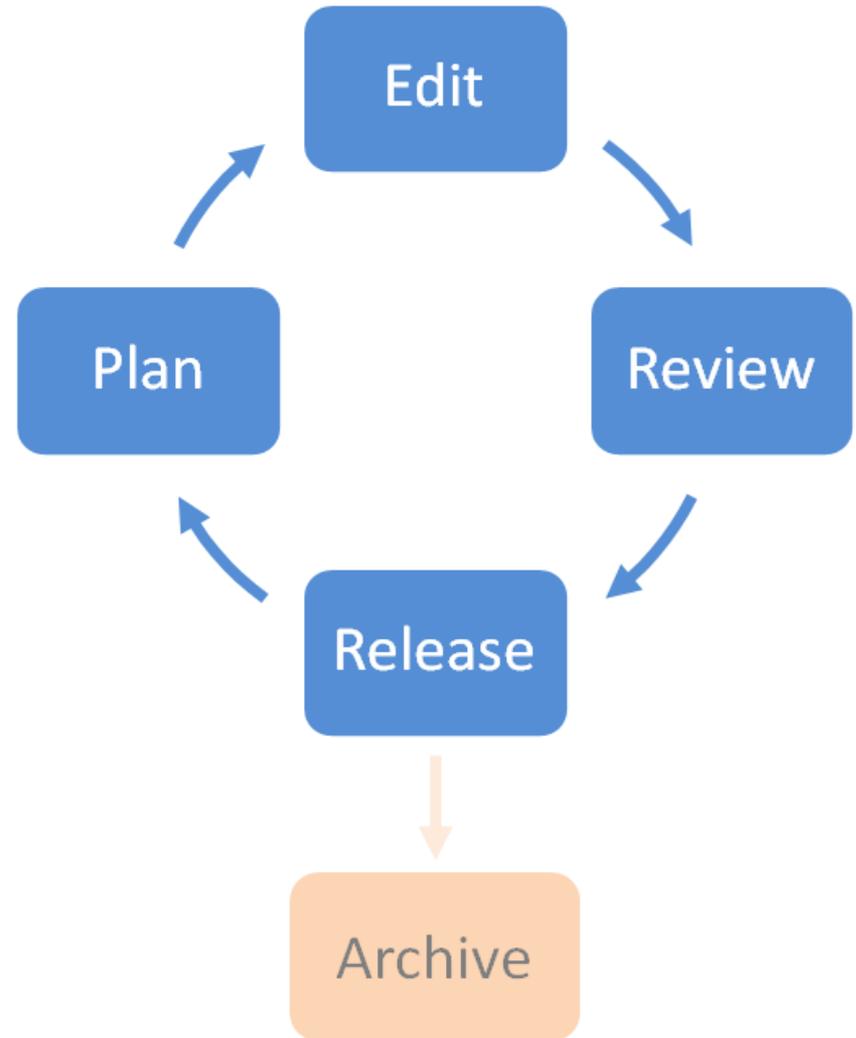


The screenshot displays the 'Document' management interface in OMNITRACKER. The top section, titled 'Document', contains various fields for document properties:

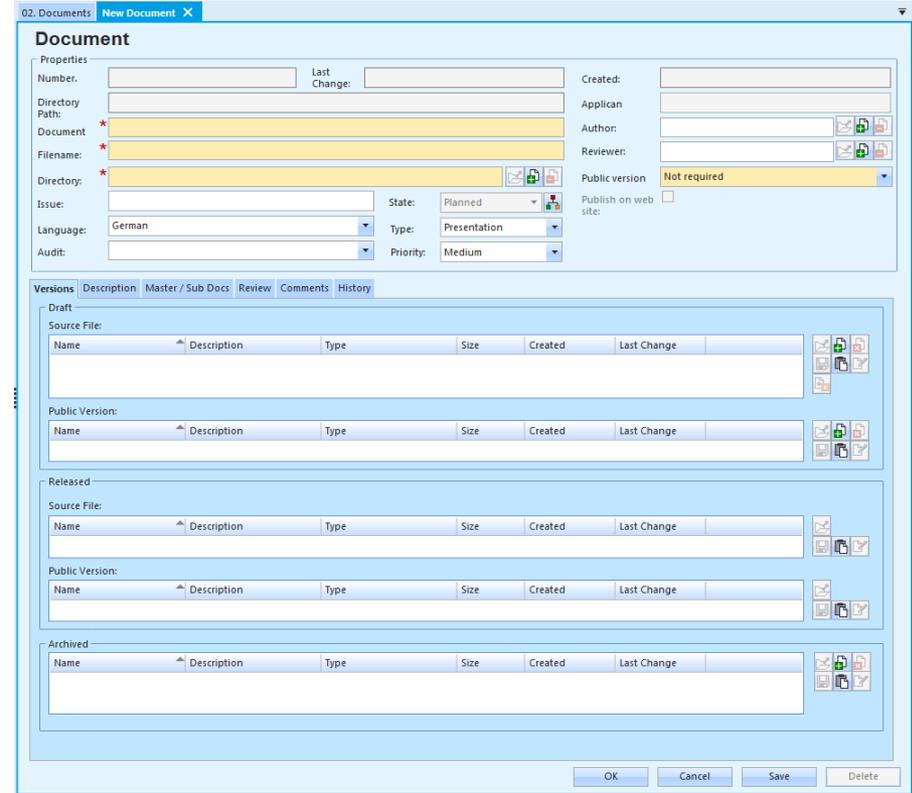
- Properties:** Number (Doc-000030), Last Change (06.11.2013 14:53:24), Created (06.11.2013 14:53:24).
- Directory:** Path (empty), Document (My-Document), Filename (My-Document.docx).
- Issue:** General Information, State (In Progress), Language (German), Type (Presentation), Priority (Medium).
- Author/Reviewer:** Applicant (Mr. Boss Peter, +49 (0)126) 25979 110, Author and Reviewer fields with user selection icons.
- Public version:** Not required, with a 'Publish on web site' checkbox.

The bottom section, titled 'Versions', shows a table with columns for Name, Description, Type, Size, Created, and Last Change. It is divided into three categories: Draft, Released, and Archived. Each category contains a table for source files and public versions, with icons for actions like 'New', 'Delete', and 'Refresh'.

- Plan
- Edit
- Review
- Release
- Archive



- Mandatory data for saving the document:
 - Document (name of document)
 - Filename
 - Directory
- Optional data:
 - Author
 - Reviewer
 - Format of public version
 - Description
 - Draft of source file
 - Version
 - Audit interval
 - etc.



The screenshot shows the 'New Document' dialog box in the OMNITRACKER software. The dialog is titled '02. Documents New Document' and contains various input fields and sections for document configuration.

Document Properties:

- Number:
- Last Change:
- Created:
- Directory Path:
- Document: (highlighted in yellow)
- Filename: (highlighted in yellow)
- Directory: (highlighted in yellow)
- Issue:
- Language:
- Audit:
- Applican:
- Author:
- Reviewer:
- Public version:
- State:
- Type:
- Priority:
- Publish on web site:

Versions: Description | Master / Sub Docs | Review | Comments | History

Draft:

Name	Description	Type	Size	Created	Last Change

Public Version:

Name	Description	Type	Size	Created	Last Change

Released:

Source File:

Name	Description	Type	Size	Created	Last Change

Public Version:

Name	Description	Type	Size	Created	Last Change

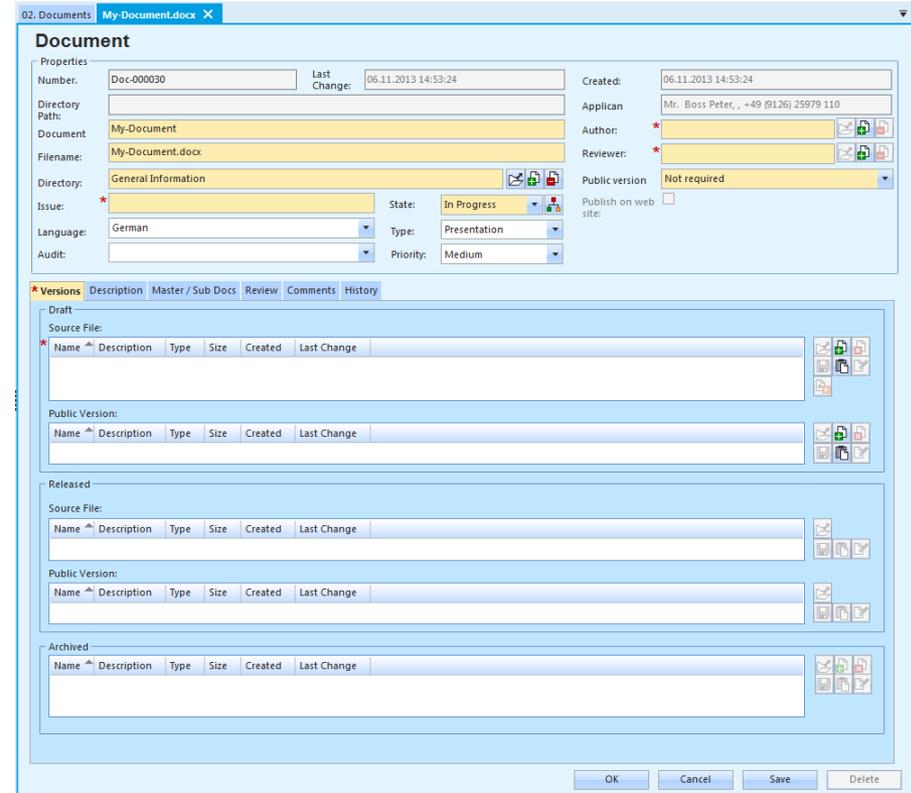
Archived:

Name	Description	Type	Size	Created	Last Change

Buttons: OK, Cancel, Save, Delete

Mandatory data for saving the document in state "In Progress":

- Issue
- Author
- Reviewer
- Draft of the source file. If no file is uploaded, the field is filled automatically:
 - New document: An empty document will be automatically attached as initial draft.
 - New version: A copy of the released version (source file) is added as draft.



- Mandatory data for saving the document in state "In Review":
 - If a public version is planned, the draft file for the public version.
- Reviewer automatically is requested by email to review the document and if requested the public version.
- On the "Review" tab files concerning the review can be uploaded, e.g. commented files.

Document

Properties

Number: Doc-000030 Last Change: 06.11.2013 15:01:06 Created: 06.11.2013 14:53:24

Directory Path: [Empty]

Document: My-Document

Filename: My-Document.docx

Directory: General Information

Issue: 1.0 State: In Review

Language: German Type: Presentation

Audit: [Empty] Priority: Medium

Applican: Mr. Boss Peter, +49 (0)126) 25979 110

Author: Ms. Buch Birgit, +49 (0)126) 25979 110

Reviewer: Mr. Boss Peter, +49 (0)126) 25979 110

Public version: PDF

Public on web site:

Versions Description Master / Sub Docs Review Comments History

Draft

Source File:

Name	Description	Type	Size	Created	Last Change
My-Document.docx	1.0	File	3 Bytes	06.11.2013 15:01:06	06.11.2013 15:01:06

Public Version:

Name	Description	Type	Size	Created	Last Change
My-Document.pdf	1.0	File	80,2 KB (82.163 Bytes)		

Released

Source File:

Name	Description	Type	Size	Created	Last Change
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Public Version:

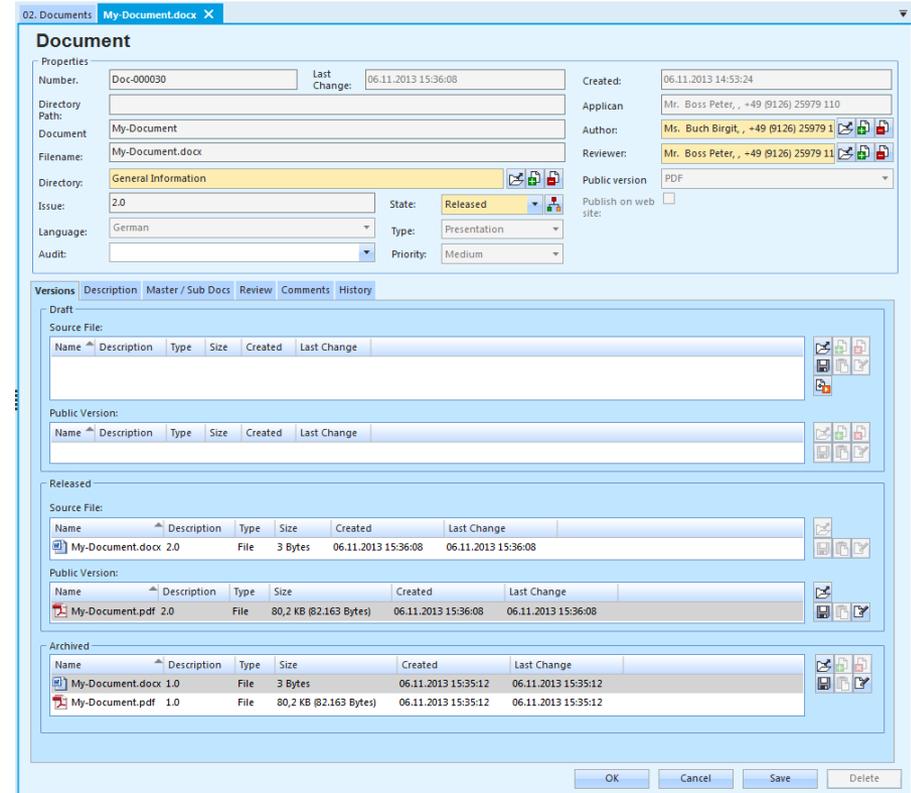
Name	Description	Type	Size	Created	Last Change
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Archived

Name	Description	Type	Size	Created	Last Change
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OK Cancel Save Delete

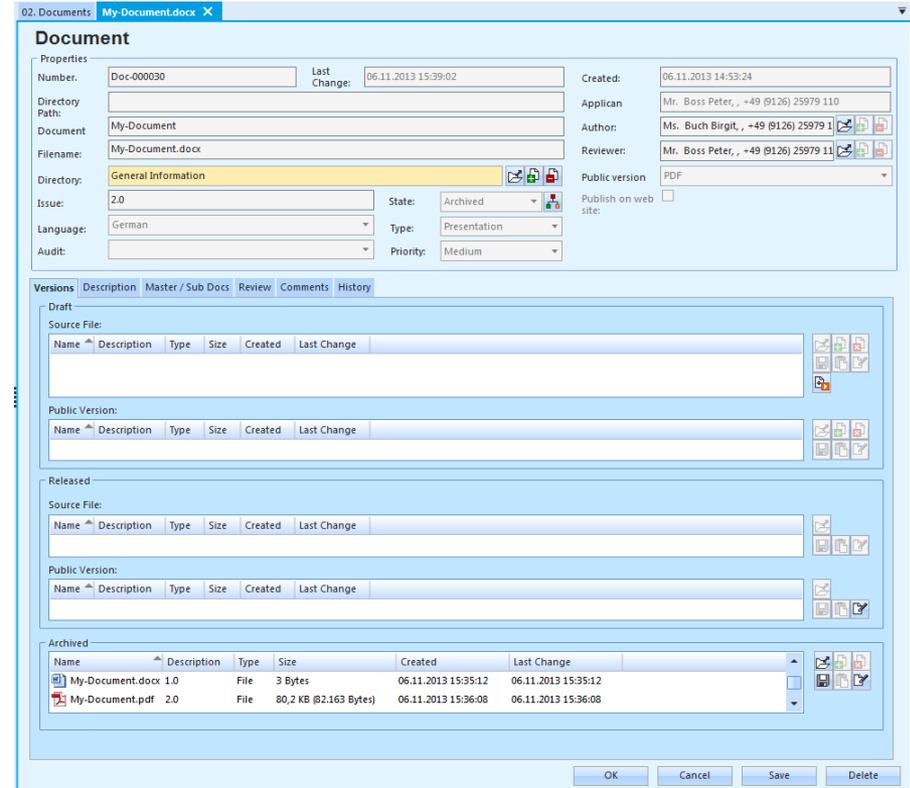
- Mandatory data for saving the document in state "Released":
 - Comment
- When the document is released, the draft files are automatically moved to the section for the released files.
- If there already was a released version, the corresponding files are archived.



The screenshot shows the 'Document' form in the OMNITRACKER system. The form is divided into several sections:

- Properties:** Includes fields for Number (Doc-000030), Last Change (06.11.2013 15:36:08), Created (06.11.2013 14:53:24), Directory Path, Document (My-Documents), Filename (My-Documents.docx), Directory (General Information), Issue (2.0), Language (German), Audit, State (Released), Priority (Medium), Applicant (Mr. Boss Peter, +49 (0)126) 25979 110), Author (Ms. Buch Birgit, +49 (0)126) 25979 110), Reviewer (Mr. Boss Peter, +49 (0)126) 25979 110), and Public version (PDF).
- Source File:** A table with columns: Name, Description, Type, Size, Created, Last Change. It shows one entry: My-Documents.docx 2.0, File, 3 Bytes, 06.11.2013 15:36:08, 06.11.2013 15:36:08.
- Public Version:** A table with columns: Name, Description, Type, Size, Created, Last Change. It shows one entry: My-Documents.pdf 2.0, File, 80,2 KB (82.163 Bytes), 06.11.2013 15:36:08, 06.11.2013 15:36:08.
- Released:** A table with columns: Name, Description, Type, Size, Created, Last Change. It shows one entry: My-Documents.docx 1.0, File, 3 Bytes, 06.11.2013 15:35:12, 06.11.2013 15:35:12.
- Archived:** A table with columns: Name, Description, Type, Size, Created, Last Change. It shows one entry: My-Documents.pdf 1.0, File, 80,2 KB (82.163 Bytes), 06.11.2013 15:35:12, 06.11.2013 15:35:12.

- Before a document can be finally archived, it has to be set to state "Obsolete".
- Mandatory data for saving the document in state "Obsolete":
 - Comment
- If the document is not used any more, it can be archived:
 - State "Archived"
 - The released documents are archived.
- The document is visible only for managers and administrators.



Document

Properties

Number: Doc-000030 Last Change: 06.11.2013 15:39:02 Created: 06.11.2013 14:53:24

Directory Path: Applica: Mr. Boss Peter, +49 (0)126) 25979 110

Document: My-Documents Author: Ms. Buch Birgit, +49 (0)126) 25979 110

Filename: My-Documents.docx Reviewer: Mr. Boss Peter, +49 (0)126) 25979 110

Directory: General Information Public version: PDF

Issue: 2.0 State: Archived Publish on web site:

Language: German Type: Presentation

Audit: Priority: Medium

Versions | Description | Master / Sub Docs | Review | Comments | History

Draft

Source File:

Name	Description	Type	Size	Created	Last Change
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Public Version:

Name	Description	Type	Size	Created	Last Change
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Released

Source File:

Name	Description	Type	Size	Created	Last Change
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Public Version:

Name	Description	Type	Size	Created	Last Change
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Archived

Name	Description	Type	Size	Created	Last Change
My-Documents.docx	1.0	File	3 Bytes	06.11.2013 15:35:12	06.11.2013 15:35:12
My-Documents.pdf	2.0	File	80,2 KB (82.163 Bytes)	06.11.2013 15:36:08	06.11.2013 15:36:08

OK Cancel Save Delete

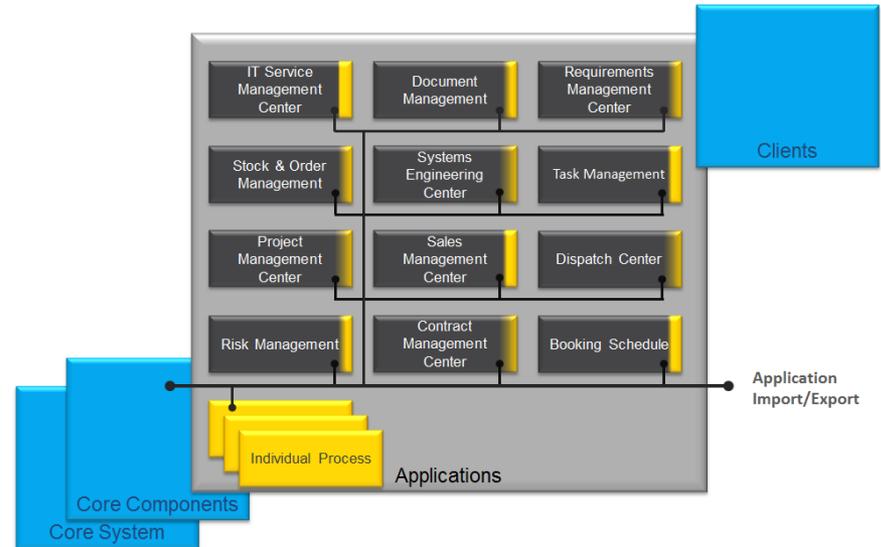
For clear information and fast evaluation OMNITRACKER Document Management supports the following predefined reports that can be customized easily and flexible:

- Changed Documents Last Week: List of documents that have been changed within the last week.
- List of Documents (selected): Contains the most important information about all documents that are selected in the list.
- Released within last Week: List of documents that have been released within the last week.

For a quick overview OMNITRACKER Document Management provides predefined filters:

- **Current Documents:** Documents that are not obsolete or archived.
- **My Documents (Applicant):** Documents the current user has created.
- **My Documents (Author):** Documents for which the current user is set as author.
- **My Documents (Reviewer):** Documents for which the current user is set as reviewer.
- **Obsolete Documents:** Documents in state "Obsolete".
- **Planned Documents:** Documents in state "Planned".
- **Released Documents:** Documents in state "Released".
- **Released Documents after:** Documents that have been released after a date that has to be entered.
- **Released within last Week:** Documents that have been released within the last week.

- OMNITRACKER Document Management can be integrated within current OMNITRACKER installations.
- Integration of further OMNITRACKER solutions, e.g. OMNITRACKER Project Management Center.



Thanks for your attention!

Questions?



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