

# DOCSnet *Document Management*

DOCSnet is a document management system that puts you in control of managing documents within your organisation. You can quickly and easily locate documents without searching through complex directory structures. Every file or document managed by DOCSnet has an associated Document Profile. This Document Profile is like a library catalogue card, listing the author, document name, client and matter/job, and other fields of information for that document. When you want to retrieve a document, you can specify a search that is based on any combination of fields within the Document Profile. DOCSnet will search across all documents within your organisation, but of course you must have the proper security rights to be able to retrieve a document.

Regardless of the size of your organisation, DOCSnet is an invaluable tool in managing your documents. It can access files stored on a stand-alone workstation or on a network server. It can utilise either an Access database or a centralised SQL database, giving you tremendous scalability in your organisation.

## File Types

New Office documents can be profiled directly when created using DOCSnet. Other types of files such as PDF files can be imported into DOCSnet and profiled at any time, as can Office documents which already exist in your organisation.

## Integration

DOCSnet is fully integrated with the Microsoft Office suite, including the ability to save emails and attachments in Microsoft Outlook. You can open, save and insert documents stored via DOCSnet, and even create Word mail merges using DOCSnet documents.

Need to open a file that hasn't been profiled – or save a file without profiling it?? Simply hold down the Shift key and choose the Open or Save command – you will bypass the DOCSnet forms and gain access to your local directories.



display the last 30 documents you have edited

DocNo	Description	MatterNo	ClientNo	DocType	Author	Typist Create	Typist Edit
1053	Letter to mortgagors	10930	MELCRU	MISC	TONY	KIT	KIT
1030	Employment agreement (Completed)	CCS001	CCS	ADMN	JACK	BRUNO	KIT
1031	A letter to an associate	CCS001	CCS	LETT	JACK	BRUNO	KIT
1029	An assembled document	TBA	TBA	MISC	JACK	BRUNO	KIT
1051	Application to council	10923	AAA001	MISC	BRUNO	KIT	KIT



profile and save a new document, or save changes to an existing document and update the Document Profile with date and time and current user

## Ease of Use

DOCSnet has a simple but powerful interface. All user commands are accessible from only 3 forms. There is no intensive training required to master DOCSnet and your employees can start using this product with ease from day 1.

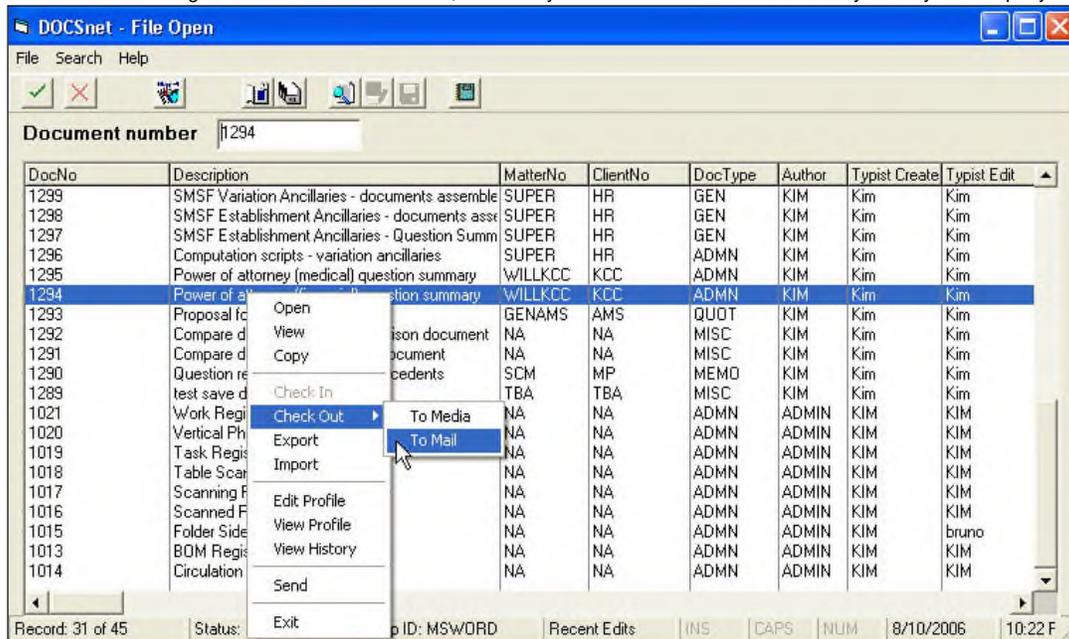
## Security and Administration

DOCSnet includes user-level security. If entitled to secure documents, a user can specify that the Document Profile is to be viewed by secured users only, or can choose to make the details within the Document Profile available for viewing by all users. A secured document can only be opened by a secured user.

DOCSnet comes with an administration module which takes care of all background work including all database lookups and general settings such as library locations and storage defaults. DOCSnet Administration also provides housekeeping tasks such as bulk document deletion and/or archiving, restoring from archive, file system checks and bulk document import.

## File Open Form

This is the main DOCSnet form and from here you can retrieve recently edited documents or conduct a search of all documents. You can store search settings to be reused at a later time, either for your own use or accessible to everyone in your company.



With a right mouse click or via a selection from the menu on the form, you can:

- ✓ Open the selected document for editing
- ✓ View the document without opening
- ✓ Copy a document and apply a new Document Profile to it
- ✓ Delete the document (if allowed)
- ✓ Edit or view a file's Document Profile without opening the file
- ✓ Check a document out to work on it and then check it back in later (other users receive a message telling them the document is checked out if they try to access it)
- ✓ Export a document to another location – diskette, local directory or laptop computer, for example
- ✓ Import an existing document and attach a Document Profile to it

You can sort the displayed list by clicking any column header on the form, and you can print a report of all the documents listed (this is very useful when a list of documents has been returned from a search)

## Document Profile Form

This form is displayed when saving a new file. A new document number is automatically generated and the user assigns information for the fields on the Document Profile. Some fields can be mandatory or optional, depending on your company's requirements.

The screenshot shows the 'DOCSnet - Save As' window. It has several input fields: Description (Appeal letter to council), Matter number (10923), Client number (AAA001), Document type (LETT), and Notes (Need to follow up if no response in 7 days). There is a Keywords section with 'Assigned' and 'Choose from' lists. The 'Document storage' section has radio buttons for Delete, Archive, and Permanent. At the bottom, there are fields for Author (ADMIN), Typist (Kim Tangey), and a 'Save as' dropdown menu set to 'Word Document (\*.doc)'. There are also checkboxes for 'Secure document' and 'Secure profile'.

## Document Search Form

This form conducts a search of Document Profiles and returns a list of documents matching any combination of fields as specified on this form. Even old documents which have been archived can be included in a search.

The screenshot shows the 'DOCSnet - Document Search' window. It has a search bar and several input fields: Doc. Number, Description, Matter number, Client number, Document type, Application ID (MSWORD), and Keywords. There is a 'Document storage' section with radio buttons for All types, Delete, Archive, and Permanent. At the bottom, there are fields for Author Id, Created by, Last edited by, and Date ranges (Created btw, Last edited btw). There are also checkboxes for 'Document secured', 'Profile secured', and 'Checked Out'.