



Functional Overview

For

Document Management



Document Management

DocWorkbench provides an effective and practical tool for the creation and management of all Outbound and Inbound documents. The software is implemented on the desktop as a separate application to Workbench in order to make it available to all staff involved with project related documents and thereby provide a corporate solution for document management.

Features include:

- Integration to MS Office – Word, Excel, Powerpoint, Outlook.
- Record and store documents in any file format and view with the native application or compatible viewer.
- Store and Retrieve documents with an extensive range of user defined criteria including:
 - Job Code
 - Document Title
 - Document Purpose/Type
 - Company
 - From Person, To Person.
 - Author
 - Our Ref, Their Ref.
 - File Name
 - Status
 - Key Words
 - Date Range
- Extensive search functions on the Workbench database for:
 - Jobs
 - Companies
 - People
 - Email Addresses
- Save Emails and Attachments with option to save attachments separately.
- From MS Outlook use the DocWorkbench search function to locate files to be attached to Outbound Emails.
- From within MS Office applications email the current document as an attachment.
- Create Word Documents from templates that contain merge fields from the Workbench database.
- Mandatory Save fields to ensure the integrity of the document register.
- User defined conventions for system generated Folder and File Names.
- User defined Internal References.
- Integrates with Microsoft Explorer to locate and register files from applications that do not integrate with DocWorkbench.
- Register Inbound hardcopy documents and record physical file location.
- Integration with other Workbench modules:
 - Drawing Register
 - Meeting Minutes
 - Actions/Tasks.

Save Documents

Save DocWorkbench

Basic Advanced People

Basic Details

Inbound Outbound Internal

Title : _____

Doc Purpose : _____

Job Code (F4) : _____

Company (F4) : _____

Our Ref. : _____

Their Ref. : _____

File Name : Document Management1.doc

File Path : C:\Data\Sales Material\Marketing\Brochures\

Delivery By : _____ Hold

Status : _____

Save Cancel

Search for Documents

Search DocWorkbench

Basic Advanced

Basic Details

Inbound Outbound Internal

Title : _____

Doc Purpose : _____ HardCopy :

Job Code (F4) : _____

Company (F4) : _____

From Person (F4) : _____

To Person (F4) : _____

Author (F4) : _____

Our Reference : _____

Their Reference : _____ Archived :

File Type : _____ Hold :

Search New Cancel

Email Address Lookup

Email Address Lookup

Sort By

Surname First Name Company

Select

Employee Others

Name : _____

Address Detail

Personal : _____ Use Update

Company : _____ Update

Message Recipients

To -> _____

Cc -> _____

Bcc -> _____

OK Cancel