






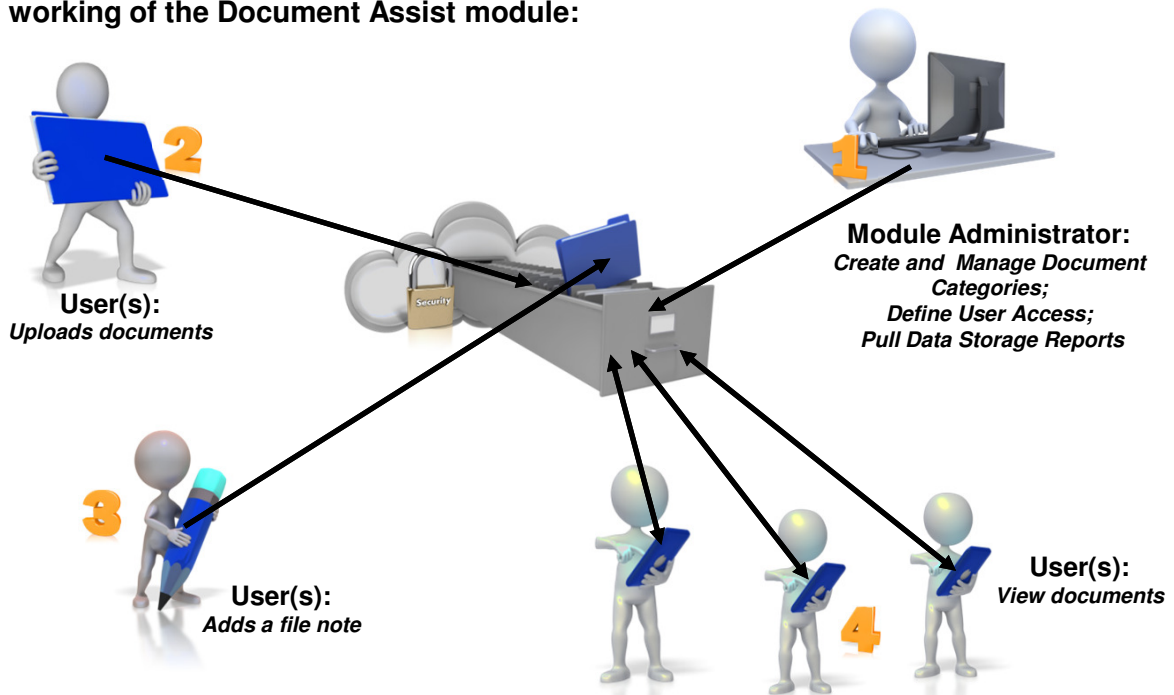
Purpose of the Documents Assist module:

Document Assist acts as a repository of electronic copies of the organisation's documentation. The Module Administrator defines the categories of documents and is responsible for assigning user access to each of the categories created. Only those users authorised to create categories, upload, view and / or delete documents to category of documents, will have access to the functionality. This module can be setup to assist with the management of the organisation with the management of various categories of documents and / or operational processes which include:



-  the management of operational documents and contracts;
-  the management of Human Resource documents such as payslips, contracts and IRP5s
-  the management of COSEC and other statutory documents and agreements;
-  the management of Governance processes and documents;
-  the management of document flows associated with SLAs with outsourced service providers e.g. outsources accounting and / or payroll services.

The working of the Document Assist module:












- 1** - The module administrator defines the categories of documents to be managed on the system. Once the categories and sub categories of documents have been created, the module administrator assigns user access to create categories, upload, view and / or delete documents. Each category is assigned to an Owner who is responsible for the documents uploaded to the category;
- 2** - Users with the correct level of user access will be able to upload documents to the categories to which they have been given access;
- 3** - Users with the correct level of user access will be able to add file notes to categories;
- 4** - Users with the correct level of user access will be able to view documents to which they have been given access;











Key Features of Document Assist include:

-  easy, user friendly document management process;
-  documents are maintained in one central database;
-  functionality for the module administrator to define and manage the create, upload, edit, delete and / or view user access for all the active module users as required by the organisation;
-  functionality for the module administrator to define the required document types to be assigned to each document uploaded to the document management repository;
-  functionality where users can gain access to the module through various means (e.g. desktop, laptop, tablet, smart phone etc.);
-  functionality where it is possible to run multiple versions of the module on the client database;
-  functionality has been built into the module to allow the user to capture file notes to document categories and may be operationally required;
-  the Document Assist module allows for 5 sub categories of documents to be created for each parent category created by the module administrator;
-  functionality where for each document uploaded the document owner can capture metadata that will be associated to the document. This will allow users with the required level of access to search for reports using that metadata captured during the document upload process;

Operational management benefits of Case Assist include:

-  high level of organisational customisation in defining the module setups to meet the organisations own business requirements;
-  improved knowledge sharing between all stakeholders as all documentation is available on a centralised database to all registered users at all times;
-  all documents are stored in a central location for easy access from any location;
-  improved governance as documents are available to all authorised users in a consistent manner;
-  the file note functionality ensures that all notes captured by all authorised users to document categories are visible to all the users and that the information maintained in a consistent manner;
-  The 5 sub categories of documents that are available for each document category created can assist the organisation with the implementation of its document / knowledge management policy and processes;

