Tutorial

DOCUMENT MANAGEMENT

Sample 001 for Azure Market Place

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1. DESCRIPTION

The Document Management System defined in AuraPortal consists of the main functions for the management, control and monitoring of any document based on its type, and has the ability to be adapted to any type of organization.

This document will guide you through the Document Management Process available by default on the AuraPortal installation which you acquired via the Microsoft marketplace.

This process is a very simple example of document management managed by AuraPortal, but it can be adapted to the user's needs and be as complex as required.

It allows us to carry out the main administration flows such as creation, consultation, modification, publication and/or elimination. It also includes the different phases of sequential Approval, which can be dynamically defined and, depending on the criteria set by the company, can even enable the digital signature in documents.

It also allows us to define the documents that the company would like to publish, as well as their time of publication on the portal, which is defined through their effective dates (beginning and end of publication).

Additionally, it allows control of the expiration dates of the documents, and monitoring and traceability of each document which is especially useful in controlling audits, whether internal or external.

We will be able to tag documents to easily locate them through search engines on the pages and add them to the favorites section for easy location on the main page.

We have defined a small control panel with charts and indicators for the document management system, which enables us to show the power of analysis, showing the documents according to their type and making it possible to establish any other analysis criterion that the company wishes to use for its control.

With the classification systems that AuraPortal offers us, we can check the document status, the traceability and monitoring at any time to provide the control needed by users or by the Department Responsibles, making sure all the company needs are displayed.

A very useful, interesting functionality available at the time of creating the document allows converting the document to PDF and including a watermark with a link to the original document. This provides verification that the document has not been modified from the original, thus fulfilling any validation and integrity rules for the stored documents.
2. LOGIN AND USER ROLES

2.1. Open Explorer and write the Installation URL (this one is an example)

2.2. Log in with the required role

2.3. User roles

This Document Management process is made for five participants but as mentioned before it can be completely adapted for all scenarios.

- **Ap1** (Mike Lewis): Document Creator
- **Ap2** (Josh): Supervisor
- **Ap3** (Will Witon): Editor
- **Ap4** (Susan): Reviewer
- **Ap5** (Luis): Publisher
3. HOME SCREEN

Left area of the entry page (1):

- Dashboard. This option will take us to the entry page.
- My Tasks. This leads to a page where we can see all our tasks.
- Documents. Here we can see all the published documents.

Central area of the entry page (2):

- At the top of the central area we have three buttons for starting processes: + New Document, Modify Document and Delete Document.
- Just below we have four reports where we can see our tasks depending on the performer.
- Below the reports we have a document search engine, by Area and Category.
- At the bottom we can see the Favorite Documents.

Right area of the entry page (3):

- First of all we have a video explaining the Document Management Process.
- Just below we can see 2 charts that show the amount of documents grouped by Area and Category.
- At the bottom we have a list of the last published documents.
4. EXECUTION DIAGRAMS

These are only Execution Diagrams, to see how the flows work in the processes for the Creation, Modification and Deletion of documents.

4.1. Create Document
4.2. Modify Document
4.3. Delete Document
5. CREATE NEW DOCUMENT

5.1. Creator Task (Ap1 Mike Lewis)

In this task the creator fills in the Name, Description and Labels for subsequent filtering, he integrates a document, sets a period of publication and adds comments for the supervisor; then he clicks Submit.
5.2. Supervisor Task (Ap2 Josh)

The supervisor reads the comments with the changes that need to be made and if the changes are accepted, he submits the document for editing or approves the new creation. He can also add comments for the reviewer or the creator.
5.3. Editor Task (Ap3 Will Witon)

The editor reads the comments to see what is being requested and then makes any necessary changes, then explains the modification or comments that could be useful in the comments log.
5.4. Reviewer Task (Ap4 Susan)

The reviewer reads the comments that explain the changes that have been made. If the changes are accepted, she may proceed to approve the revision. Otherwise, it will be denied.
5.5. Publisher Task (Ap5 Luis)

The publisher reads the comments and the document. If everything is correct, he may proceed to approve or deny it. If denied, he can add comments.
6. MODIFY DOCUMENT

6.1. Select document to modify

1. The Document to be modified is selected.

2. All the necessary changes are explained to the supervisor in the Comment Log.
6.2. Supervisor task (Ap2 Josh)

1. The supervisor reads the comments with the changes that need to be made.
2. If he accepts the changes, he proceeds to edition. Otherwise, he denies the edition.
3. He adds comments for the reviewer (if approved) or for the creator (if denied).
6.3. Editor task (Ap3 Will Witon)

1. The editor reads the comments to see what is being requested.

2. Then he explains the result of the modification in the comments.

He presses the 'e' icon to edit the integrated document.
6.4 Reviewer task (Ap4 Susan)

1. The reviewer reads the comments that explain the changes that have been made.
2. If she accepts the changes, she approves the revision if everything is correct. Otherwise, she denies it.
3. She adds comments for the approver (if approved) or for the creator (if denied).
6.5. Supervisor task (Ap2 Josh)

The supervisor checks the comment log and approves or rejects. If approved the task will go to the publisher, if not it will go back to the editor with the changes suggested by the supervisor.
6.6. Publisher Task (Ap5 Luis)

The publisher checks the Comment log and approves and publishes or not depending on the Comments made by the Supervisor.
7. DELETE DOCUMENT

7.1. Select Document to Delete

1. A document is selected for deletion.

2. The reasons for requesting the document deletion are explained in the comments.
7.2. Supervisor Task (Ap2 Josh)

1. The supervisor reads the comments with the reasons for deleting the document.

2. If the reasons are accepted, he proceeds with the deletion. Otherwise, he denies the deletion.
   Then he chooses whether to publish it or not.

3. On clicking the Submit button, the following message will appear to confirm the publication: