



Document Management System

Version: 1
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SUMMARY

The Document Management System is an iMIS add-on developed and supported by Karapoti Consulting.

We have long recognized the need for an efficient and intuitive way of providing files to members on-line. The files available to members need to be able to be segregated by class and able to be filtered ad-hoc, to ensure members are restricted to only those files they have the rights to access. The files need to be able to be easily uploaded by staff via the staff view. And all this needs to be done anywhere, anytime, and place – via web.

SOLUTION

The files are listed along with metadata as clickable links – click to download and open. The file list is simply a clever IQA so it can be filtered and customized as required by the Client.

File Type	FileName	Version	Upload Date	Uploaded By	File Size
	64061_1604_001.pdf McNab - NFC - 64061		15/04/2016	Elliot Riley	324552
	64061-McNab_20-day letter to complainant.docx 64061-McNab_20-day letter to complainant.docx				38880
	64061-McNab_letter from AM_20160310.pdf 64061-McNab_letter from AM_20160310.pdf				127526
	64061-McNab_Complaint summary.docx 64061-McNab_Complaint summary.docx				16321

The files are uploaded by the staff via the staff site using a custom control. The custom control allows for additional meta-data and criteria to be selected when uploading the file.

Upload File

Enter Brief Description (optional):

Select File:

 No file chosen

The files are physically held on the web server in a specific folder so can be accessed outside of the website.

The links and metadata are held in a standard user-defined table, keyed to either

1. the individual Members (for files relevant to those members), or
2. the client organization (for general file libraries)

The upload process captures date/time of upload and the staff member who did the upload.

Versioning is supported.

IMPLEMENTATION

Full implementation instructions are provided including the source code for the custom web control.

And .. customization is simple - we can tailor the document management system to meet most client requirements.

And .. its NOT an iPart so will be supported through upgrades.

NEXT STEPS

Contact Karapoti Consulting with your specific requirements and we will be happy to provide a quote.