# intelex
# Document Control

The Intelex Document Control System is a 100% web based solution that streamlines the control, routing and revisions management for critical documentation and records. It leverages a database driven engine to facilitate the creation, approval, storage, control, update and destruction of documents, records, lists and inventories.

## Document Control Highlights

- ➤ 100% web based
- ➤ Controls documents in any format
- ➤ Automatic full text search
- ➤ Track editable and web viewable versions of the same document
- ➤ Escalating email notifications
- ➤ Web based feedback forms
- ➤ Online distribution to groups and individuals
- ➤ Tracks and archives all document revisions
- ➤ Document change request forms and follow-up workflow
- ➤ Flexible security for multiple user groups & stakeholders
- ➤ My Tasks Menus
- ➤ Manager's Dashboard
- ➤ Compatible with any email system
- ➤ Auto notifications to employees
- ➤ Enterprise wide roll-up summaries
- ➤ Configurable security access
- ➤ Oracle or SQL Server database support
- ➤ Scalable to unlimited users
- ➤ ASP or in-house installations
- ➤ Superior and personal support

## Contents

## Performance Management

- ➤ **Easy setup** saves dozens to hundreds of hours in organizing documents utilizing hierarchical folder trees, shortcuts to master versions, and browser based cut, copy and paste functionality

- ➤ **Automatic email notification** of document approvals and reviews, and single click access to feedback forms keep you up-to-date with accurate information.

- ➤ **Automatic task notifications** keep you informed and aware of upcoming tasks.

- ➤ **Unlimited escalations** for pending and overdue tasks lets superiors at various levels monitor project progress.

- ➤ **Manager's Dashboard** summarizes current performance activities and can be filtered to the appropriate management level.

## Legacy System Integration

- ➤ **Integration** with MS Office and complete compatibility allow you to work with any document format.

- ➤ **External database integration** lets you utilize existing databases without having to re-input data.

- ➤ **Universal e-mail support** enables integration with any e-mail system ensuring complete compatibility.

# INTELEX

**www.intelex.com/document_control**

# Document Control

**For a Live Demo or Free Trial:**
Call 416-599-6009
Email intelex@intelex.com

## Document Security

➤ **Security views** provide control access for supervisors, managers and departmental / regional staff.

➤ **Administrator access control** lets you set administrator access to editable versions of documents while controlling general access to read only versions.

## Configurable System Features

➤ **Configurable views** which let you control information based on work group, location, or management responsibility

➤ **Configurable default values**

➤ **Configurable field properties:** Mandatory, Read Only, Update Only, etc.

➤ **User defined** selection lists (unlimited table entries with appropriate linkages)

➤ **Control of data forms** throughout the workflow process with context sensitive **security**

## Task Management Features

➤ **Embedded hyperlinks** within tasks save you time by allowing instant access to related information

➤ **Personalized** My Tasks, My Staff's Tasks and My Location Tasks Menus let you work the way YOU want to

➤ Quickly identify all pending and overdue actions with the graphical **Manager's Dashboard**.

➤ **Configurable Dashboard** displays specific user/user group information for easy analysis

➤ **Dashboard and Task Menus** can be filtered by location, process or management responsibility for observation

## Document Revisions and Version Tracking

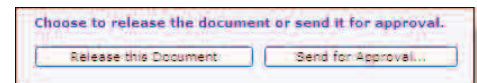➤ Track **revision information, approvals** for that revision, and **distribution** for that revision
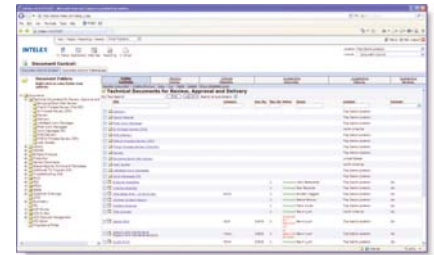
➤ Track and issue **change requests** and schedule reviews

*The intuitive folder structure lets you easily view and access document names, locations, revisions, owners, and status, all from a single screen.*

➤ **Track previous versions** of documents

➤ Track periodic **document reviews** with person responsible, frequencies, instructions and attachments, record review history and resulting revisions

➤ Web based **document change request forms** enable all staff to contribute to document improvements

➤ **Remote check-in / check-out** allows you to save revisions and interim versions of documents from a remote location
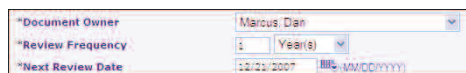
## Document Approvals and Distribution

➤ Time intensive process of tracking down document approvals / reviews is **streamlined** as staff have access to the most current, controlled versions of documents available

➤ **Automated system** prompts the user to send the document out for approvals/reviews prior to release

➤ Users can select from a **central listing of approvers** or select a group distribution list

## INTELEX

# intelex Document Control

For a **Live Demo** or **Free Trial:**
Call 416-599-6009
Email intelex@intelex.com

➤ **Automatic notification** to people responsible allows them to click directly on a link in their email to view a screen where they can confirm approval, or reject the document and upload an edited copy

➤ Administrators can create a **distribution list** which will trigger **email notifications** to all staff, suppliers or customers requiring access to updated documents

## Indexing and Access Control

➤ Web based system enables **various levels of access** dependant on a user's security settings


Upload the original document file and its web viewable version if required.
Click here to select the file(s) to upload...
☐ Original document file has been uploaded.
☐ Web viewable document file has been uploaded.

➤ Document administrators can organize documents in **web based folders**, enabling ultimate control over which users (and user groups) may access the documents

➤ **Document administrators** can access all current and previous revisions of documents

➤ **General users** have access to only the most current released version of documents

➤ Each **employee, supplier, customer** or other **shareholder** can have access to a web based document index organized to directly meet their specific needs


*Document Owner    Marcus, Dan
*Review Frequency    1    Year(s)
*Next Review Date    12/21/2007    MM/DD/YYYY

➤ **Automatic full-text search** enables you to find any document in seconds saving time and frustration

## Obsolete Documents and Document Archiving

➤ **Obsolete documents** and **outdated revisions** of current documents are removed from all points of issue and points of use

➤ Obsolete documents retained for legal and/or knowledge preservation purposes are suitably identified

## Reporting Features

➤ **WYSWYG printing** of online document inventories and filter records by owner, process, business unit, revision number, category and more

➤ **Export records** to Excel, Word, PDF and HTML

➤ **Web access** allows you to easily publish documents to your intranet or the internet

➤ **Dashboard** and **Task Menus** can be filtered by location, process or management responsibility for easy analysis

### Tips for implementing Your Document Management System

➤ Determine how you want to structure your organization's documents and then set up the document folder tree in the Intelex Document Control Module to match this structure.

➤ Register your documents in their native format (Word, Excel, PPT, etc.) and if necessary, send them electronically for approval and distribution.

➤ Schedule periodic reviews of documents and maintain a history of document reviews.

➤ Revise controlled documents as required and archive the previous revisions electronically for future reference.

➤ Provide read-only access to electronic versions of released documents to the appropriate personnel.

# INTELEX

# intelex
# Document Control

**For a Live Demo or Free Trial:**
Call 416-599-6009
Email intelex@intelex.com

The Intelex system streamlines data management and reporting with web based data collection forms, optimized requirements assignment screens and user specific dashboard status screens.

## Step 1.

**Setup Document Control Folders**
Create online hierarchical folder trees to organize and control access to documents. Build folder trees specific to locations, work groups, processes or any groupings.
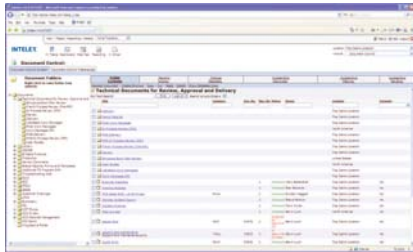
## Step 2.

**Upload & Organize Documents**
The Intelex System features a 'Super Fast Document Uploader' that streamlines document entry and management. Organize documents by folder, create master versions and provide shortcuts to stakeholders who need access.
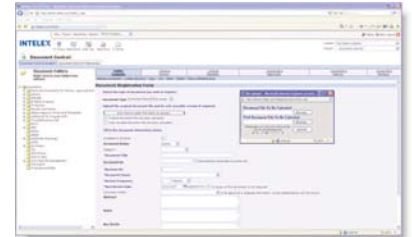
## Step 4.

**Document Control & Distribution**
Once approved, documents are controlled and made available through a web based document index. Access to documents can be controlled through a central security console.
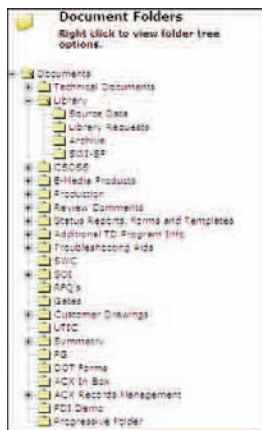
## Step 3.

**Automated Approvals & Distribution Routing**
The Intelex Document Control System contains a work-flow management engine that facilitates the document approvals and revisions process.
- ▶ Select approvers from central listings & distribution lists
- ▶ Automatic email notifications to person responsible
- ▶ Single click access to feedback screens
- ▶ Approvers & Reviewers can upload edited documents to assist with updating and tracking changes
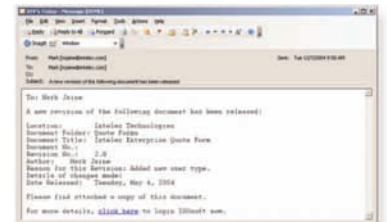
## Step 5.

**Revisions Archiving**
The Intelex System includes a complete revisions management process, enabling the archiving of unlimited past revisions and revision information such as change details, approvers, reviews and more.

## Step 6.

**Document Management & Reporting**
The Intelex System tracks all document reviews, change requests and related document activities. Documents can also be linked to any other module within the system, enabling integrated action item tracking with related documents.

Many reports are available including Document Master Lists, Document Revisions History, Document Listings Related to Process, Overdue Approvals & Reviews and many more.

# INTELEX

# intelex Document Control

For a **Live Demo** or **Free Trial:**
Call 416-599-6009
Email intelex@intelex.com

## Additional Systems and Modules

*The Intelex Document Control Module is available stand-alone or fully integrated with any of Intelex's other Modules and Systems.*

Intelex offers complete, cutting edge solutions for Enterprise Performance Management.  The Intelex System features an entirely web based interface and functionality that addresses users at all levels of the organization.

Managing processes and business performance requires a comprehensive approach.  Organizations must carefully consider and control activities to ensure all stakeholder expectations and regulatory requirements are met.  The Intelex System has been designed to enable organizations to implement and maintain a comprehensive approach to continual improvement with the tools that drive process efficiency, due diligence, and performance monitoring.

The Intelex Management System has Modules structured per International Management System Standards such as the ISO 9001:2000 Quality, ISO 14001 Environmental and OHSAS 18001 Safety Management System Standards.   Though not all organizations using the Intelex system need to pursue these Management System frameworks, all users can benefit from the proven approach set by these standards.

Intelex's web based Management System solutions are extremely flexible, enabling you to utilize any of the Modules available as stand-alone systems, or combine multiple Modules to form your own tailored Management System solution.

Pre-configured systems include the:
- Intelex Safety Management System incorporating OHSAS 18001.
- Intelex Environmental Management System incorporating ISO 14001.
- Intelex Quality Management System incorporating ISO 9001:2000.

*Contact us today and see how Intelex can help you with your environmental, quality, safety, or general Business Performance Management needs.*

### Intelex Platform Features

- ► 100% web based interface
- ► User specific activity management
- ► Organization wide data roll-up and reporting
- ► User specific performance dashboards
- ► Security and user specific views
- ► Multilingual support
- ► In house installations
- ► Scalability
- ► Database integration
- ► Customization services
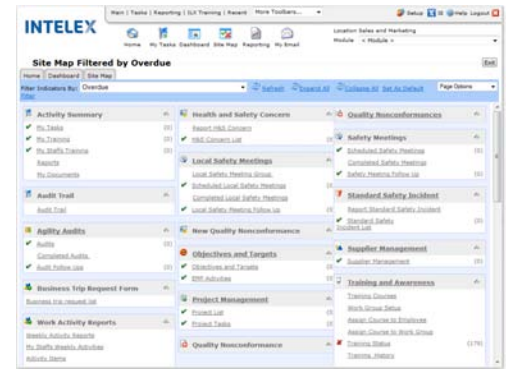
*The Intelex Sitemap provides a 60,000 ft. overview of all data managed within the Intelex System and its various Modules.  Completed tasks are indicated and outstanding issues are flagged.*

### More Modules Available*

- ► Training Management
- ► Audits Management
- ► Nonconformances, Corrective/Preventive Actions
- ► Permits & Related Activities
- ► ISO 14001 Implementation
- ► ISO 9001:2000 Implementation
- ► Maintenance, Measurement & Monitoring
- ► Safety Incident Reporting
- ► Environmental Incident Reporting
- ► Quality Nonconformances & Product Defect Tracking
- ► Supplier Management
- ► More!

*To view all available Modules visit*
*www.intelex.com/modules*

*Any of the Modules can be selected and combined to form a unique Management System solution.*

**Intelex Technologies Inc.** ● **366 Adelaide Street West, Suite 100** ● **Toronto, ON  M5V 1R9**
**T:  416-599-6009** ● **F:  416-599-6867** ● **E:  intelex@intelex.com** ● **www.intelex.com**

## INTELEX