

Document management module

Receive and manage documents

The “**View documents**” function of QM Pilot is for all employees who are interested only in approved documents.

The “**Edit documents**” is available to all those who enter, review or approve documents.



In all cases, the work is carried out via an Internet browser (Internet Explorer, Firefox, Chrome or Safari), regardless of whether a PC, laptop, tablet or smartphone is used.

The documents, irrespective of whether they are Word, Excel, PowerPoint or PDF documents, are stored in the QM Pilot database. With a unique document link, they can be further processed and made available.

Meta data – information about the documents

Within the QM Pilot, documents are described by

- Number
- Name
- Language
- Status
- Version
- Owner
- Reviewer
- Approver
- Date of creation
- Date of change
- Reason for change
- Valid as of – Valid until
- Resubmission (date)
- Document type
- Keywords
- Comment
- Link

Characteristic data

If necessary, characteristic data for a document can also be entered. This data can be freely configured.

Functions applicable to documents

The icons show what functions can be applied to the document. Functions that are not possible due to the status or role of the user are not displayed.

CL-1.27 Checkliste SWOT-Analyse 👁️ 🖨️ ☆ 📧

DOCUMENT DATA CHARACTERISTICS PREVIEW

↶ check out
📄 Open
✎ Edit
📄 New Version
🌐 New language
📄 Create Copy
🗑️ Delete
📁 Archive
🔑 Authorizations
📄 Usage
🕒 Show History
💬 Show feedbacks
✅ Show followers

NUMBER CL-1.27	NAME OF Checkliste SWOT-Analyse	TYPE
DOCUMENT CL-SWOT-Analyse.doc	DOCUMENT LINK: https://demo1.qm-pilot.com/demo/File/CoreDownload/188/CL-SWOT-Analyse.doc	
LANGUAGE deutsch	STATUS Released	VERSION 2.0
DOCUMENT OWNER Uwe Abel	CHECKER System Admin ✓	RELEASER Christian Alberti ✓

Publish
📄 MORE INFORMATION

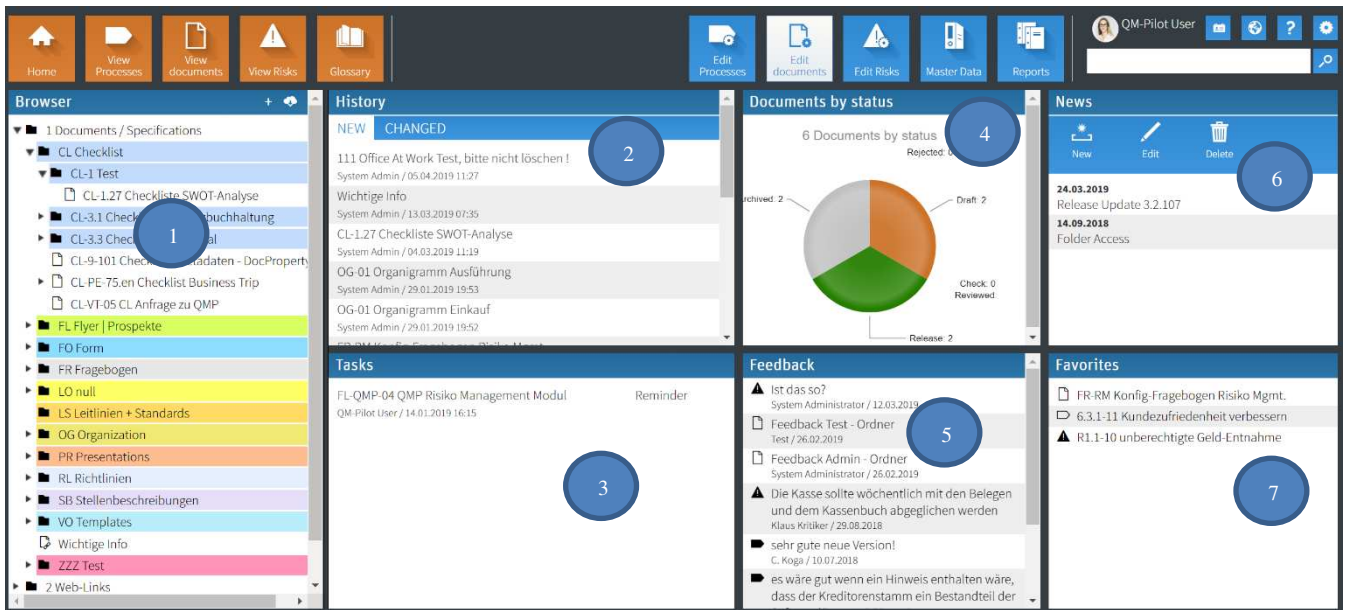
NO	DESCRIPTION	V...	STATUS	LANGUAGE	CHANGED	CREATED
CL-1.27	Checkliste SWOT-Analyse	2.0	Released	deutsch	System Admin / 14/03/2019 09:51	System Admin / 04/03/2019 11:19
CL-1.27	Checkliste SWOT-Analyse	1.9	Draft	deutsch	demo 23 / 12/02/2019 15:06	demo 23 / 12/02/2019 15:06

In the table below, the history of the document can be read and any versions, included archived ones, can be accessed.

In the “**Edit documents**” environment, a portal is available to employees with an corresponding authorisation.

The following is provided in this “cockpit” view:

- the **structure of the storage** of the documents in a browser or Explorer view (1)
- the **course** of the newly entered or changed documents (2)
- the personal **tasks** (review, approve, resubmission) (3)
- the number of **accesses** to documents over the last few days or overview on the status of all documents as a pie chart (4)
- the **feedback** on processes, documents or risks for which the user is responsible as the owner (5)
- the **News** area, where you can create new News, modify or delete existing News (6)
- the list of personal **favourites** (7)



Web links

In addition to the (default) documents that need to be “controlled” from a QM point of view, Web links can be stored and used as an aid in process steps.

Example: link to the “Federal Law on Employment in Industry, Trade and Commerce”. With this, you ensure that reference is always made to the currently valid version.

NUMBER
ArG

NAME OF
Bundesgesetz über die Arbeit in
Industrie, Gewerbe und Handel

EXTERNAL LINK
http://www.admin.ch/ch/d/sr/c822_11.html

