shareflex® QUALITY DOCUMENTS

FEATURE OVERVIEW

QM COCKPIT

- ✓ Quick and easy access to relevant information from the QM portal
- ✓ Tree diagrams for processes, organisation charts etc.
- ✓ Integration of process maps
- ✓ Personalised favourites and filters
- ✓ Access to central documents
- ✓ Latest publications of documents

DOCUMENT CREATION

- ✓ Simple document creation based on templates
- ✓ Multilingual document management
- ✓ Use of existing document templates
- ✓ Automatic generation of document numbers

PROCESS MAP

- ✓ Dynamic navigation in processes and documents via graphical process map
- ✓ Review and approval of processes also via approval workflow

WORKFLOWS

- ✓ Standard-compliant document control
- ✓ Multi-stage and configurable approval process
- ✓ Recorded acknowledgement of published documents
- ✓ Expiry date monitoring, including document resubmission
- ✓ Change requests for documents
- ✓ Automatic cumulative email notifications
- ✓ Absence management
- ✓ Proxy rules
- ✓ Training workflow

NOTIFICATIONS

- ✓ Daily, cumulative email notifications on approval tasks, published documents, change requests, invalid documents etc.
- ✓ Reminder function for open approval tasks at a definable interval
- ✓ Acknowledgement of published documents with reading confirmation
- ✓ Customisable and extensible email templates
- ✓ Freely definable intervals for sending emails

PERMISSIONS

- ✓ Individual permissions configurable via rules engine
- ✓ Subsequent updates of existing documents with admin functions
- ✓ Easy display of permissions

DOCUMENT MANAGEMENT AND AUDIT TRAIL

- ✓ Mapping of complete document lifecycle
- ✓ Complete history of all versions, workflows, tasks etc. of a document
- ✓ History of changes to a document
- ✓ Stable link to managed documents
- ✓ Use of easily customisable master data for document classification
- ✓ Ability to reorganise documents using admin jobs, e.g. when department names change

OFFICE INTEGRATION

Automatic transfer of metadata to documents in the following formats:

- ✓ Microsoft Word
- ✓ Microsoft Excel

ARCHIVING

- ✓ Full archiving of all document versions
- ✓ Archiving of review and approval information
- ✓ Workflow information archiving
- ✓ Archiving of invalid and withdrawn documents
- ✓ Long-term secure storage with Microsoft 365 capabilities
- ✓ Ability to convert documents to PDF/A

REPORTING

- ✓ Flexible reports on all metadata
- ✓ Excel export
- ✓ Graphical reports with Power BI

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