

Hartlepool Aspire Trust

Document Management System Overview

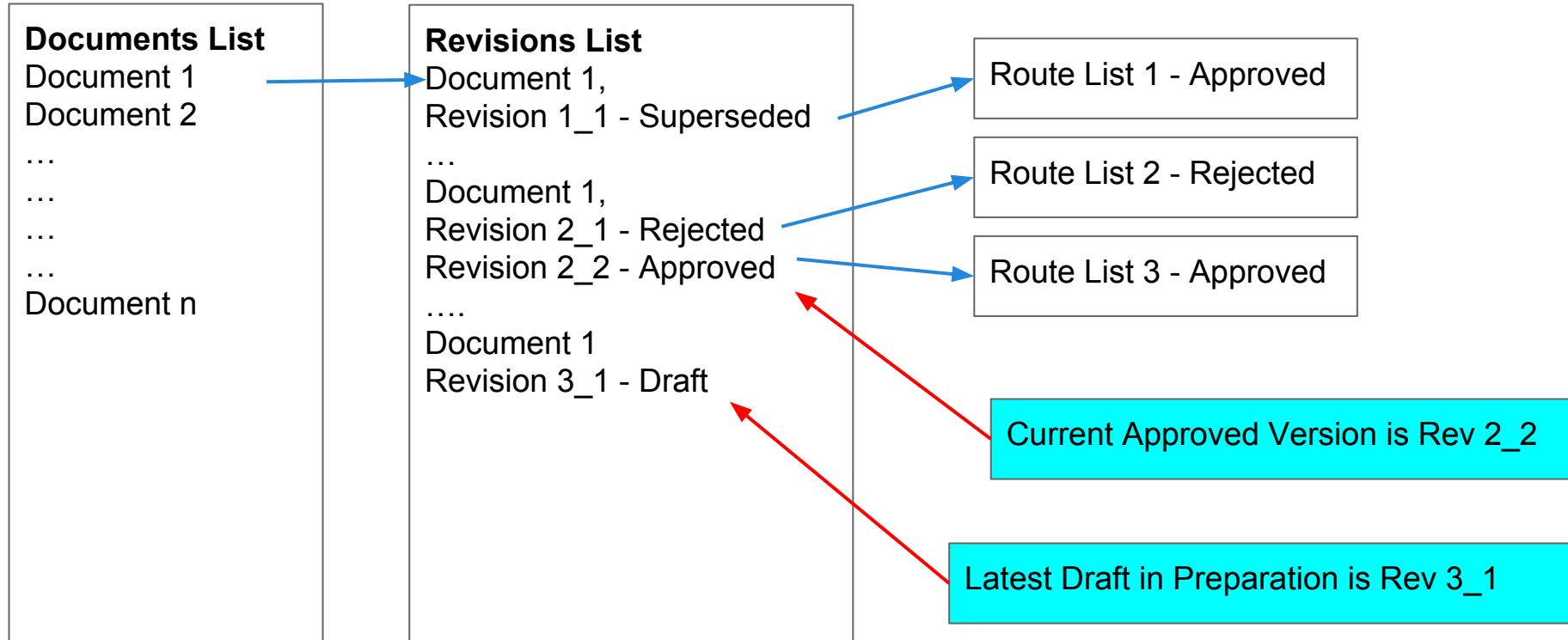
Document Management System Concepts

- This document describes the electronic Document Management System used by Hartlepool Aspire Trust.
- The following concepts are important to understanding the system:
 - **Document:** the basic record describing a document - title, document number, document type etc. A document can have multiple revisions, which are different versions of the document.
 - **Document Type:** High level type of document - Policy, Procedure, Form, Record.
 - **Document Sub-Type:** second level of document type - could be Finance, HR etc.
 - **Revision:** A record describing a particular version of a document - it has a major revision number, which is the revision number of the issued document. It can also have a minor revision number, which is used for draft versions between major revisions. A revision is approved by associating it with an approval route list. Only one Revision of a document can be at 'Approved' status. If a new revision is approved, the previous one goes to 'Superseded' status.
 - **Route List:** A route list describes the review and approval of a document revision by a number of people. Each reviewer can either approve or reject the revision. The revision is approved for issue once all of the reviewers on the route list have approved it.

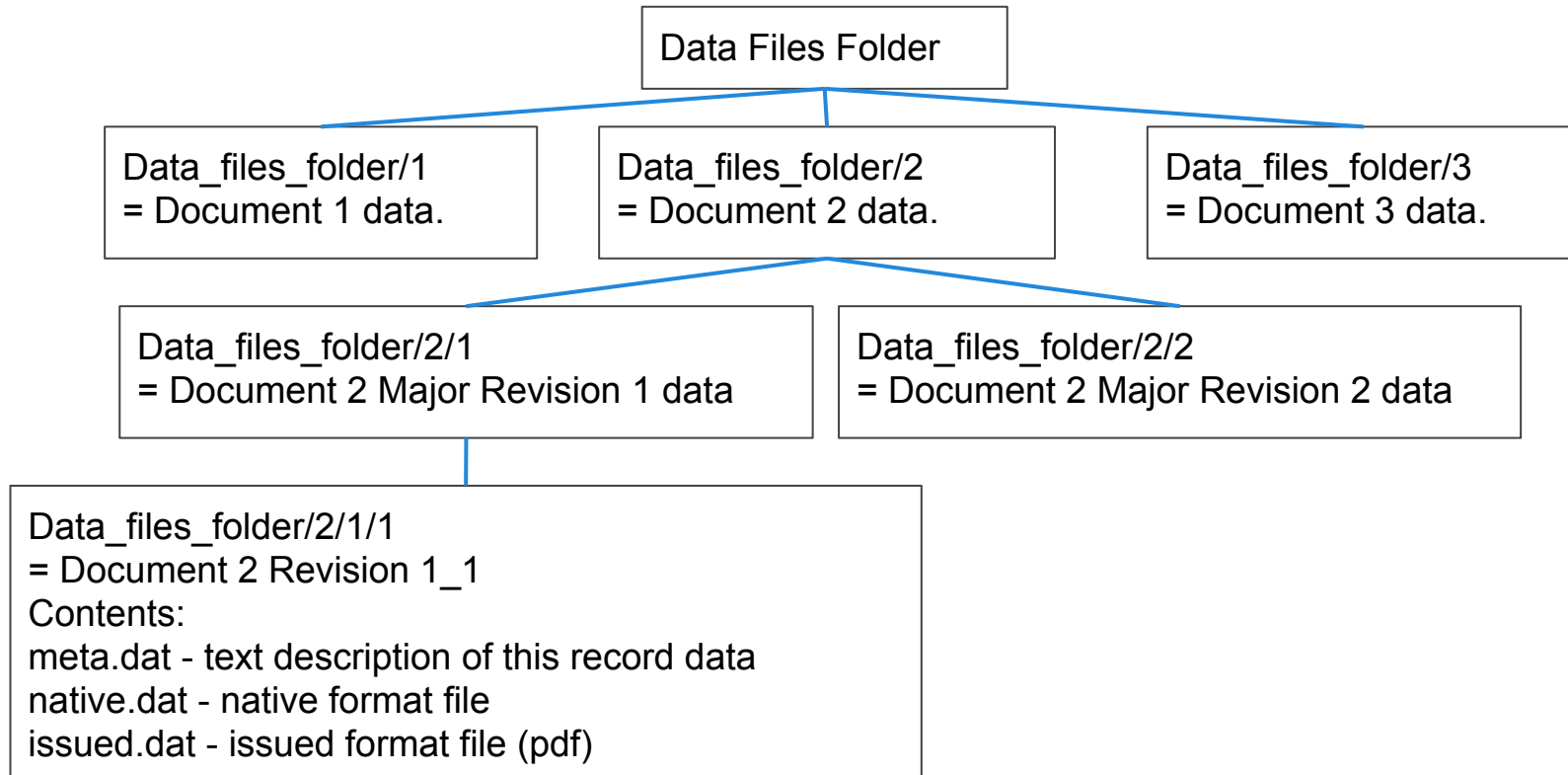
Document Types

- MSM - High Level Management System documentation - Articles of Association, Management System Manual etc.
- Policy - High Level Policy statements.
- Procedure - Working level documents describing how policies are implemented in practice.
- Form - Forms used to record activities called for in procedures.
- Record - Filled in forms that record specific activities taking place.

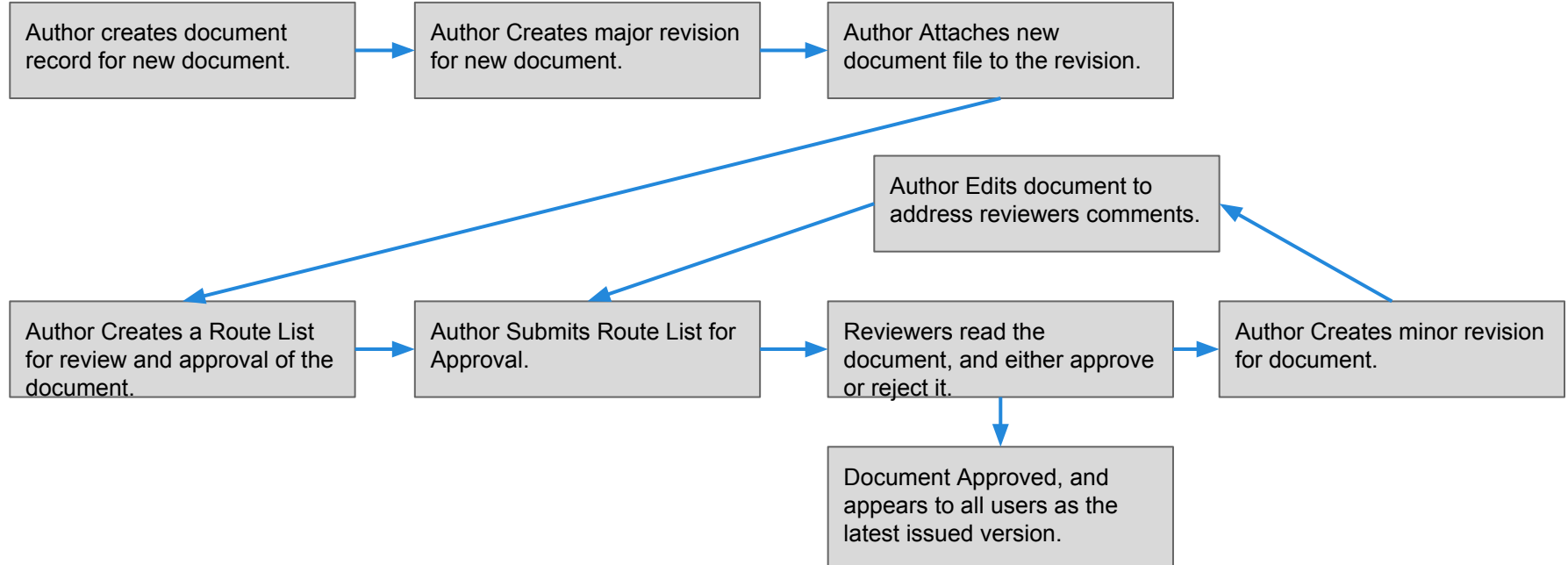
Data Structure



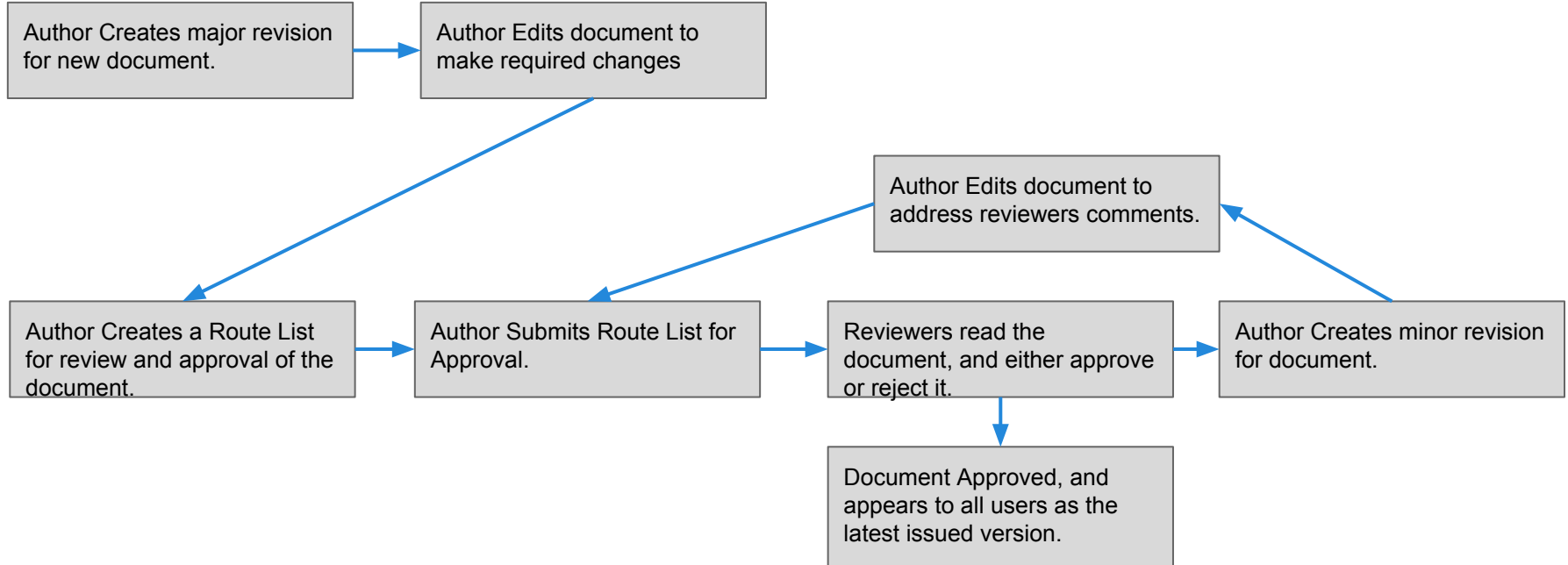
File Structure



Work Flow - New Document



Work Flow - Existing Document



Work Flow - Document Editing

Author Checks Out document, and downloads it to her local computer - Creates a new minor revision.



Author Edits local version of document to make required changes.



Author Checks in document, which uploads it to server ready for review and approval..

Work Flow - Route Lists

