



**CHALLENGES**

- Multiple copies of a document make new version distribution complex and susceptible to failure
- Most documents need one or more approval levels; difficult to manage.
- Regulatory Compliance is critical with access and change control often industry mandatory.
- Documents out for approval/review remain outstanding and slow the document development process.
- Documents are hard to find, lost in a host of storage locations and folders.

**SOLUTION**

- A Document Management application that's low-cost subscription founded on SharePoint Technology for easy customization and enhancements.
- Workflow is configured to automate the approval process and even generates reminder emails to hasten the document development.
- Document check-in/out controls document access and changes with tracking by versioning

**RESULTS**

- Documents access and change are easily managed. Single source removes problems with (change) distribution.
- Document development productivity is significantly enhanced with automated approval workflow.
- Microsoft Office direct Integration

**Document Management ONLINE (DMO)**

**BACKGROUND**

All areas of business areas create documents that need to be secure, access and change controlled, yet available to those who need access to them. Documents are often emailed for review and approval as well as solicited for editing offering little control and management. Documents are distributed to multiple persons who store them locally on their own computer making the distribution of updates very complex which often fails.

**SOLUTION**

DMO is a document management application that need only be setup as your company specifics such as document categories and user permissions. Corporate documents can be moved to our Document ONLINE solution for complete document management and with 100% guaranteed uptime on a fully hosted and managed solution.

**FEATURES**

Document Management special features include:

- Key Performance Indicators –drill-down
- Access and Check In/Out Change control based on user Permissions
- User and Role Based & Preconfigured Application
- Pre-configured Approval Workflow /Routing
- Easily Tailored Document Taxonomy
- Document Major/Minor Versioning and Auditing
- Document Version Tracking History
- Document Workflows with Automatic Alerts (with approvals & dispositions)
- Document Metadata/Properties (active, owner, title, categories, type)
- Direct Integration with Office Documents (excel, word, powerpoint)
- Full Outlook Integration (Calendar, Contacts, Tasks)
- Automatic Archiving /dispositioning enforcing corporate document policies
- Document "workspace" for document collaboration projects

**SAAS SOLUTION**

CRMO is SaaS solution fully hosted by Rackspace Hosting a leading premier hardware outsourcing provider. All of the Software Works Collaborative ONLINE Applications run on Rackspace servers which provide 100% guarantee uptime and are accessible only through a web server.

Customers do NOT purchase hardware servers or pay for software licenses. CRMO only requires user setup in the Active Directory, setup consulting services, LIVE web based how-to training, and a subscription agreement to get started. Each company receives their own CRMO instance to setup and tailor as needed with SWI Collaborative Services.

**SUBSCRIPTION PRICING**

CRMO ONLINE is immediately available on a subscription based monthly fee for a low monthly user subscription price. Contact Software Works to get registered today.

**Document ONLINE**

