

# Controlled Document Management System

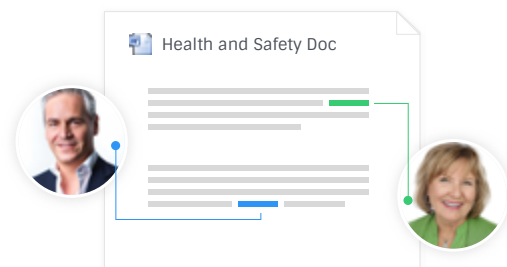
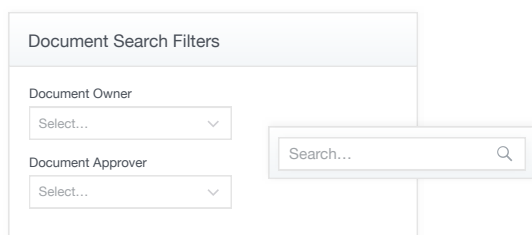


**bluebox**

1300 941 551 [BLUEBOXSOLUTIONS.COM.AU](http://BLUEBOXSOLUTIONS.COM.AU)

# It's time to take control

With the Bluebox Controlled Document Management System (CDMS) you'll benefit from automatic creation, storage, review and archival of your important business documents.

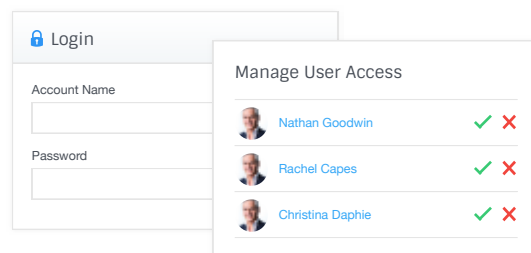
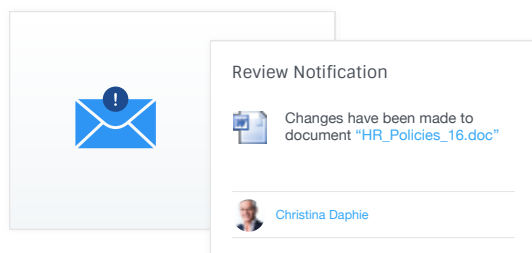


## Get Organised

Find the document you need quickly and easily with custom views and filters, automatic naming conventions, document template libraries, standardised data classification and powerful search.

## Facilitate Team Collaboration

Make it easy for your team to work together on and off-site, with remote access, collaborative authoring and a single access portal for retrieving and storing files.



## Minimise Risk and Error

Meet your compliance and quality goals using automated publishing and approval processes, periodic reviews, version controls and document activity logs.

## Improve Your Document Security

Gain peace of mind knowing your critical documents can only be modified via authorised contributors while still providing the ability for all users to contribute their knowledge via a controlled process.

# Quality & Compliance

Our clever CDMS automates and controls how documents are created, published and reviewed, so you can minimise errors, achieve consistent quality and meet compliance standards.

## Review, Publishing & Archiving Workflows

Our CDMS automates and controls your document workflows quickly and easily. With a click of a button you can allocate documents for review, publishing and archival. As a document contributor, you can receive email alerts for documents you need to review and approve and see all your upcoming workflow tasks in a single dashboard.

## Version Control

With smart version control features, our CDMS will ensure everyone is working on the right document. Equipped with a Bluebox CDMS, you can track minor and major versions of documents, look at past versions and restore original versions as needed.

## Dedicated Document Libraries

With three dedicated libraries for document storage, it's easy to track documents through their lifecycle. The draft, published and archive libraries included in our CDMS are restricted by user permissions, so you won't have to worry about team members accidentally using draft or archived documents.

## Automated Periodic Reviews

Set it and forget it! If you need to periodically review documents as a part of your workflow, the Bluebox CDMS can handle it for you. Simply set your desired review period and the CDMS will automatically send you a reminder email and add the review task to your dashboard.

## Document Audit History

CDMS document history makes auditing easy. View historical records on each document, including who worked on the document, comments that were added and when it was created, reviewed, approved and archived.

# Document Collaboration

Is your team on the same page? We make working together easier with collaborative authoring, shared document portals and mobile document access features.

## Collaborative Authoring

Working on a document with your team doesn't have to be difficult. Our CDMS allows team members to work on a single document at the same time, from wherever they are located. The collaborative authoring features allow you to see which areas of the document others are working on and refresh the page anytime to see what's new. Prefer flying solo? With the Bluebox CDMS you can 'check out' a document to prevent other users from making changes at the same time.

## Shared Document Portal

With the shared document portal included in our CDMS, you won't have to ask your team who has the correct file or where they've saved it. All of your controlled documents are stored in a single portal which users can login to access. You'll have peace of mind knowing that your important documents are stored safely and not on someone's desktop!

## Mobile & Remote Access

Working remotely? You can access instructions, contracts, procedures and other important documents on the go. The Bluebox CDMS ensures you always have access to your document libraries, even when you're not able to connect online.

# Workflow Efficiency

Without the right workflow systems, your project can easily become more complex than it needs to be, overinflating time and budgets. You can work smarter and achieve more with the intelligent, time-saving features included in the Bluebox CDMS.

## Fast & Powerful Search

Why waste time trawling through document folders when you can search instead? With the fast and powerful search included in the Bluebox CDMS, you can refine your results using the fields and layouts that are most relevant to you, searching by name, author or even text inside a document.

## Automatic Naming

Are your file naming conventions consistent across your organisation? With the Bluebox CDMS, your files will automatically be named with a unique identifier. With a logical naming system, they'll be easier to find for all team members.

## Template Libraries

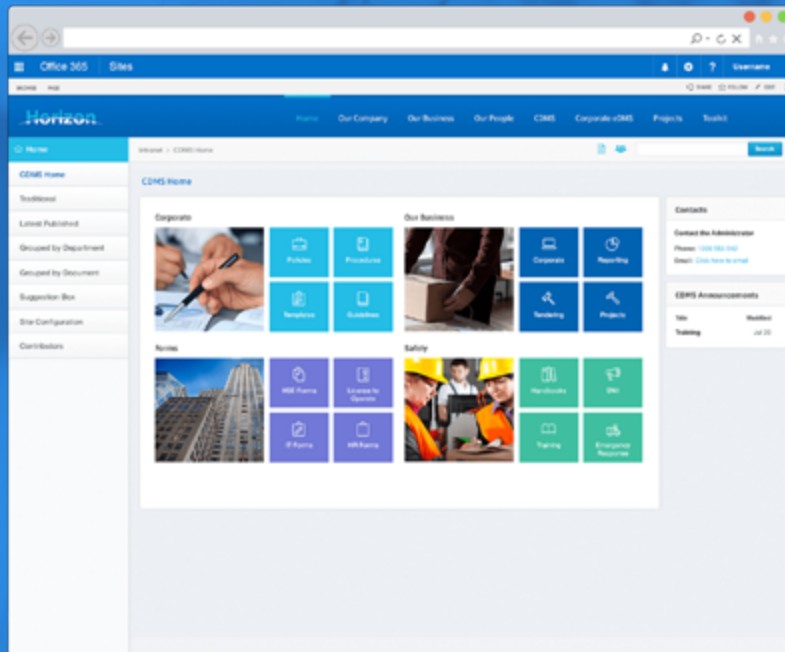
Create and use controlled document templates to speed up your workflow and encourage teams to consistently output the same processes, products and services.

## Standard Data Classification

Our CDMS allows you to label every document with pre-defined metadata attributes. These act like labels, so that you can easily find the document again when you need it. New data classification labels can only be created by select users, so you can ensure that everyone is filing their documents in the same way.

# Built for humans

Our CDMS is not only robust and feature-rich, it's also intuitive and user-friendly, making it an easy to implement solution for any business.



## Built with Microsoft SharePoint

Because it's built on SharePoint, the Bluebox CDMS seamlessly integrates with all Microsoft Office products. The powerful platform can also easily be extended to incorporate additional business processes as your business grows.

## Tried & Tested

Businesses around the world have trusted our popular CDMS for over five years and counting. We continue to invest in improving its features, design and functionality to give our customers the best experience possible.

## Training and Support

At Bluebox, we offer expert advice, content migration planning, system training and ongoing technical support to ensure your CDMS implementation.

## Familiar User Interface

Our CDMS design is based on the well known Microsoft Office suite, making it intuitive, easy to navigate and simple to learn.

## Deployment Options

Set up your CDMS on-premise, on Office365, or on a private cloud.

# CDMS Packages

Feature	Lite	Business	Enterprise
User Friendly "Tile" based navigation to easily find documents	✓	✓	✓
"My Dashboard" for easy access to work in progress	✓	✓	✓
Select documents of interest and "Pin" them to your dashboard	✓	✓	✓
Intelligent Search that provides suggestions as you type	✓	✓	✓
Search Centre to allow users to easily filter and refine search results	✓	✓	✓
Full document version control	✓	✓	✓
Read only access to the latest approved documents in the "Published" library.	✓	✓	✓
Provide controlled feedback and suggestions on documents without allowing editing of the original document.	✓	✓	✓
Secured "Draft" library for controlled editing only by authorised Contributors		✓	✓
Secured "Archive" library for controlled archiving		✓	✓
Secure folder support to restrict access to subsets of documents when required		✓	✓
Document Templates to ensure consistency of content and simplify content creation.		✓	✓
Automatically "stamp" information such as document owner, revision, and published date into documents.		✓	✓
Review and Feedback workflow process		✓	✓
Approve and Publish workflow process		✓	✓
Document Archive workflow process		✓	✓

Feature	Lite	Business	Enterprise
Automatic generation of periodic review reminders and tasks		✓	✓
Full document audit history		✓	✓
Apply an automatic naming convention to documents		✓	✓
Optionally automatically convert documents to PDF		✓	✓
Provide controlled feedback via “suggestions” to support non-Owners of documents to contribute		✓	✓
Support for document “Links” for documents stored outside of the system to have some degree of control and auditability		✓	✓
Support for relating documents to each other		✓	✓
Document Owner Dashboard for easy access to work outstanding Tasks, and upcoming document reviews		✓	✓
Document Controller Dashboard for oversight of all actions, reviews, and checked-out documents across the team		✓	✓
Automatic notification of published document updates to a distribution user group		✓	✓
Admin user configuration of workflow parameters, including email wording, default task durations and review periods		✓	✓
Role-based approvals (support for back-to-back shift workers)			✓
Joint Venture Portal Subscribe/Unsubscribe to receive subset of updated documents			✓
Automatic Re-Branding of documents to support Joint Venture or specific business units			✓
Automatic push of documents to Joint Venture project portal or specific business unit portals from centralised management			✓
QR Code automatically generated on a document to link a printed document to the latest approved electronic version			✓
Securely invite any user outside of the contributors group to provide feedback on a document			✓
Integrates with Safe Work Instructions/JSEA generation module			✓





Let's Chat

[info@blueboxsolutions.com.au](mailto:info@blueboxsolutions.com.au)

[blueboxsolutions.com.au](http://blueboxsolutions.com.au)

1300 941 551

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