



Document Management. An Overview

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About this document.

Documents are the lifeblood of any organization. Pick an industry and then for a moment think about what an average operation might undertake each and every day. What do the people do? Who do they communicate with and how? For most of us, you might be picturing an office, or a hospital, retail store or factory. No matter what the operation, document management is the universal method that underpins how people go about performing their role.

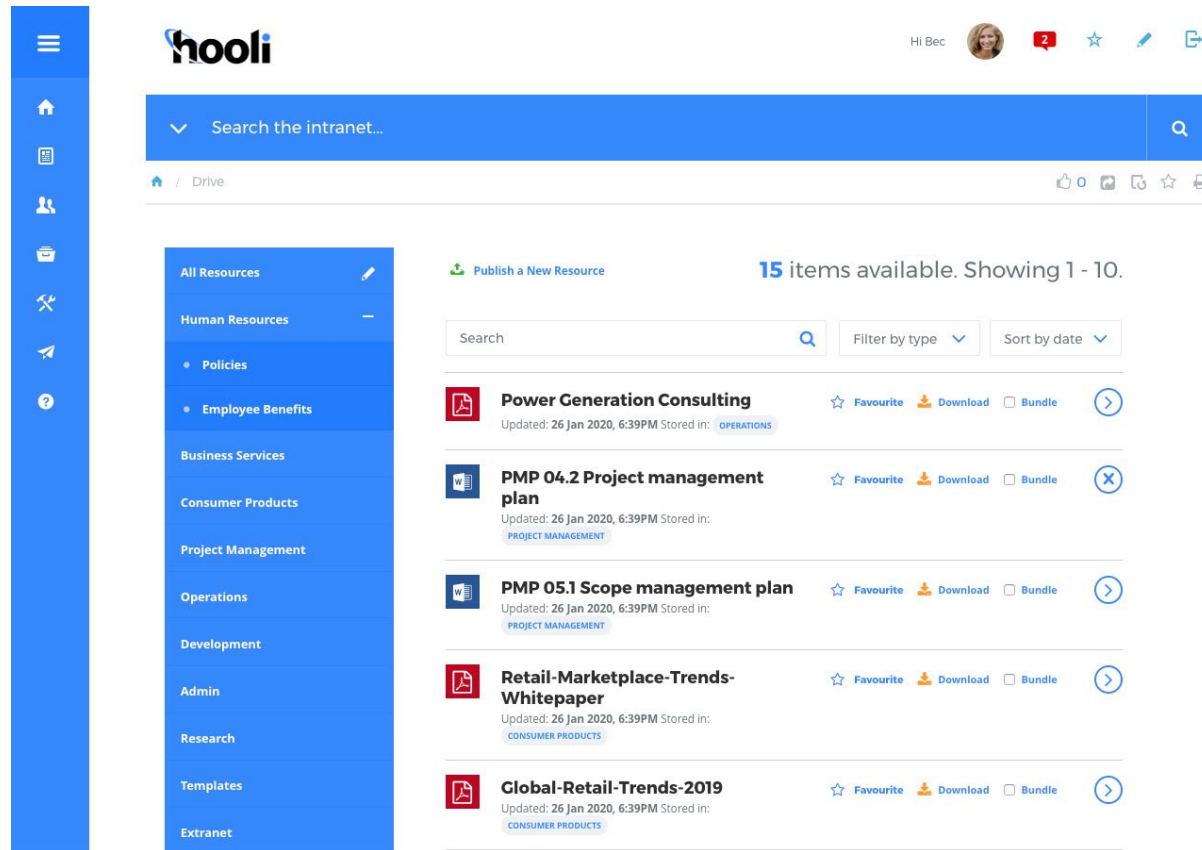
In almost all cases, documents are littered across the workplace. Stored in network drives, on company laptops, even within personal cloud accounts. How do you keep your intellectual property secure? How do you ensure your team remain compliant? How can you minimize time spent searching for files?

CentricMinds provides a single place to manage and secure your content. Replace those cluttered network drives with a modern document management solution that makes it easy to find what you need fast. Apply security to control who can view and access documents, both internally and externally from your operation. Using the CentricMinds iOS and Android app, allow team members to look up and search through documents when they are on the go.

This document provides an overview of the Document Management tools that are native to the CentricMinds Digital Workplace platform. Now you can securely manage the lifeblood of your operation within your own dedicated cloud or on premise.

Your modern Digital Workplace starts here.

CentricMinds provides your team with an intuitive and user-friendly experience for publishing and securely managing your content. It supports a wide variety of document types and enables your team to work from anywhere using a web browser, or using the dedicated iOS and Android apps.



Traditional Enterprise Document Management (DMS) platforms can be expensive, offer poor user experience, are complex to implement, and not designed to work with modern web or mobile practices. CentricMinds Document Management lets you streamline your process and replace the clutter with efficient, secure file management so you can find what you need fast.



CENTRICMINDS DOCUMENT MANAGEMENT

Publishing

Drag & Drop Publish, or connect to Office 365 or GSuite.

When you're ready to publish, choose a folder and drag and drop your documents from your network drive or from your desktop.

CentricMinds will automatically apply relevant security and metadata to the published document. Metadata tagging allows you to build powerful categorization into your document collections, enabling content automation tasks.

The image displays two screenshots of the CentricMinds Document Management interface. The left screenshot shows the 'Publish a New Resource' screen with a list of documents including 'PMP 04.2 Project management plan', 'PMP 00.0 Project management framework standard.docx', and 'Building Powerful Online Destinations'. The right screenshot shows a detailed view of a document, 'PMP 04.1 Project charter', with its metadata, actions (Download, Share, Check-out, Delete), and a table of versions. The versions table shows a history of updates with columns for Version, Date, Time, Author, and Compare.

Ver.	Date	Time	Author	Compare
1.0	26 Jan	18:41	Roberts	<input type="checkbox"/>
	Jan		Bec	<input type="checkbox"/>
	2020			<input type="checkbox"/>

As team members update versions of documents, the comparison tool will track and highlight changes made to each version of the document and by which user. Users can choose to rollback and restore previous versions of documents and also view each version from within the document repository. CentricMinds also provides integration with leading content platforms like Office 365, Google Suite, Salesforce and Dropbox.

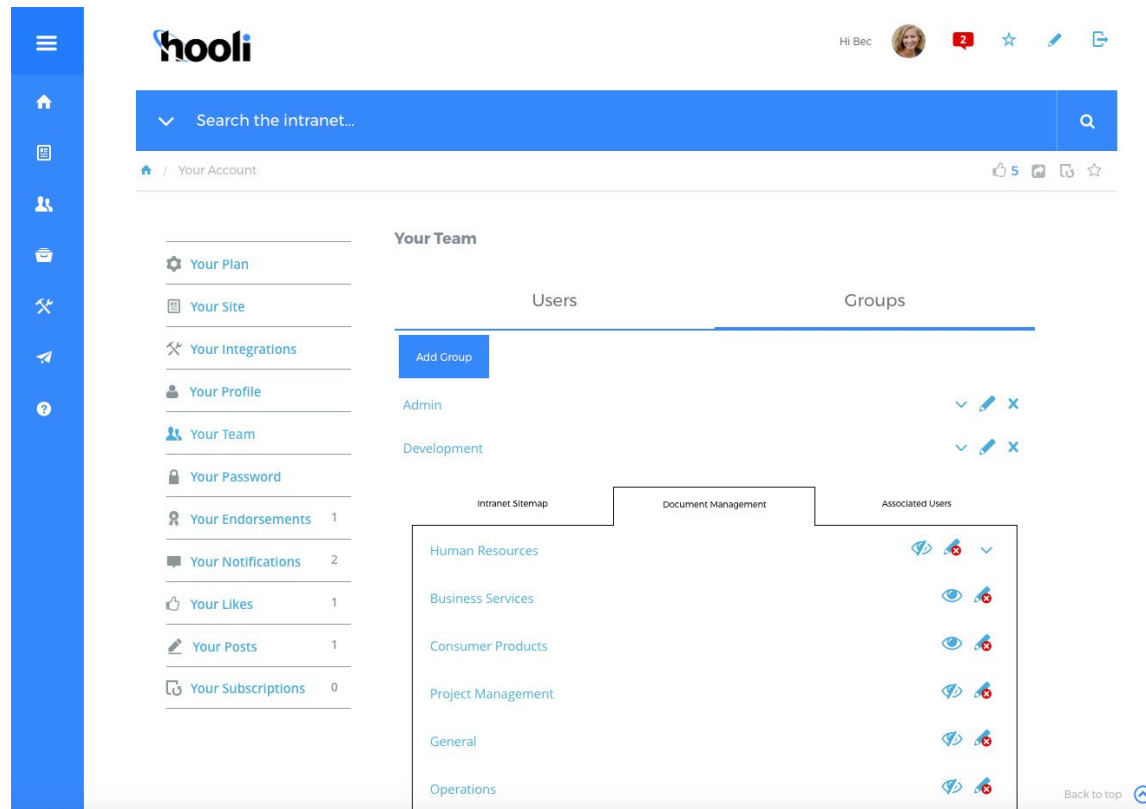


CENTRICMINDS DOCUMENT MANAGEMENT

Security

Connect to Active Directory. Apply granular security rules.

CentricMinds provides a native granular security model based on Users, Groups and Roles. CentricMinds also integrates with Microsoft Active Directory and Google Directory, and provides its own SSO that supports native password controls as well as two-factor authentication (2FA).



Create and manage Groups and Roles using the administration tools. Easily apply permissions to both internal and external users accessing documents. Audit trails automatically capture, track and display all user actions performed on documents within the Document Versioning display.



CENTRICMINDS DOCUMENT MANAGEMENT

Search

Search within documents. Apply tagging for discovery.

At the heart of CentricMinds is a powerful and native search engine. As you publish documents, CentricMinds search will securely index the contents of documents allowing users to accurately search for and discover content.

CentricMinds search also indexes content stored in cloud storage services like Google Suite and Microsoft OneDrive. Search results display where the files are located so you can instantly access them.

The screenshot displays the CentricMinds search interface. On the left is a blue sidebar with navigation icons. The main content area is divided into two sections: 'Refine Your Search' and 'Search Results'.

Refine Your Search:

- Search:** A text box containing the word 'project'.
- Date Modified:** A section with 'From / On This Day' and 'To' date pickers.
- Department:** A list of departments: Admin, Development, Finance, Human Resources, Legal, and Marketing.
- Folder:** A list of folders: Human Resources, Policies, Employee Benefits, Business Services, Consumer Products, and Project Management.
- Tags:** A text box for entering tags.
- Clear metadata filters:** A button with a close icon.

Search Results:

Your search for **project** found 11 results.

- PMP 04.2 Project management plan**
Updated: 26 Jan 2020, 06:39PM Stored in: PROJECT MANAGEMENT
- PMP 00.0 Project management framework standard**
Updated: 26 Jan 2020, 06:41PM Stored in: PROJECT MANAGEMENT
- PMP 04.1 Project charter**
Updated: 26 Jan 2020, 06:41PM Stored in: PROJECT MANAGEMENT
- CentricMinds - Planning for a successful Intranet Project**
Updated: 23 Aug 2019, 10:45PM Stored in: OPERATIONS
- PMP 05.1 Scope management plan**
Updated: 26 Jan 2020, 06:39PM Stored in: PROJECT MANAGEMENT
- Employee Engagement Overview**
Updated: 05 Feb 2019, 12:23AM Stored in: OPERATIONS
- Building Powerful Online Destinations**

Each result includes a document icon, a title, update and storage information, and action buttons: Favourite, Download, Bundle, and a right arrow.

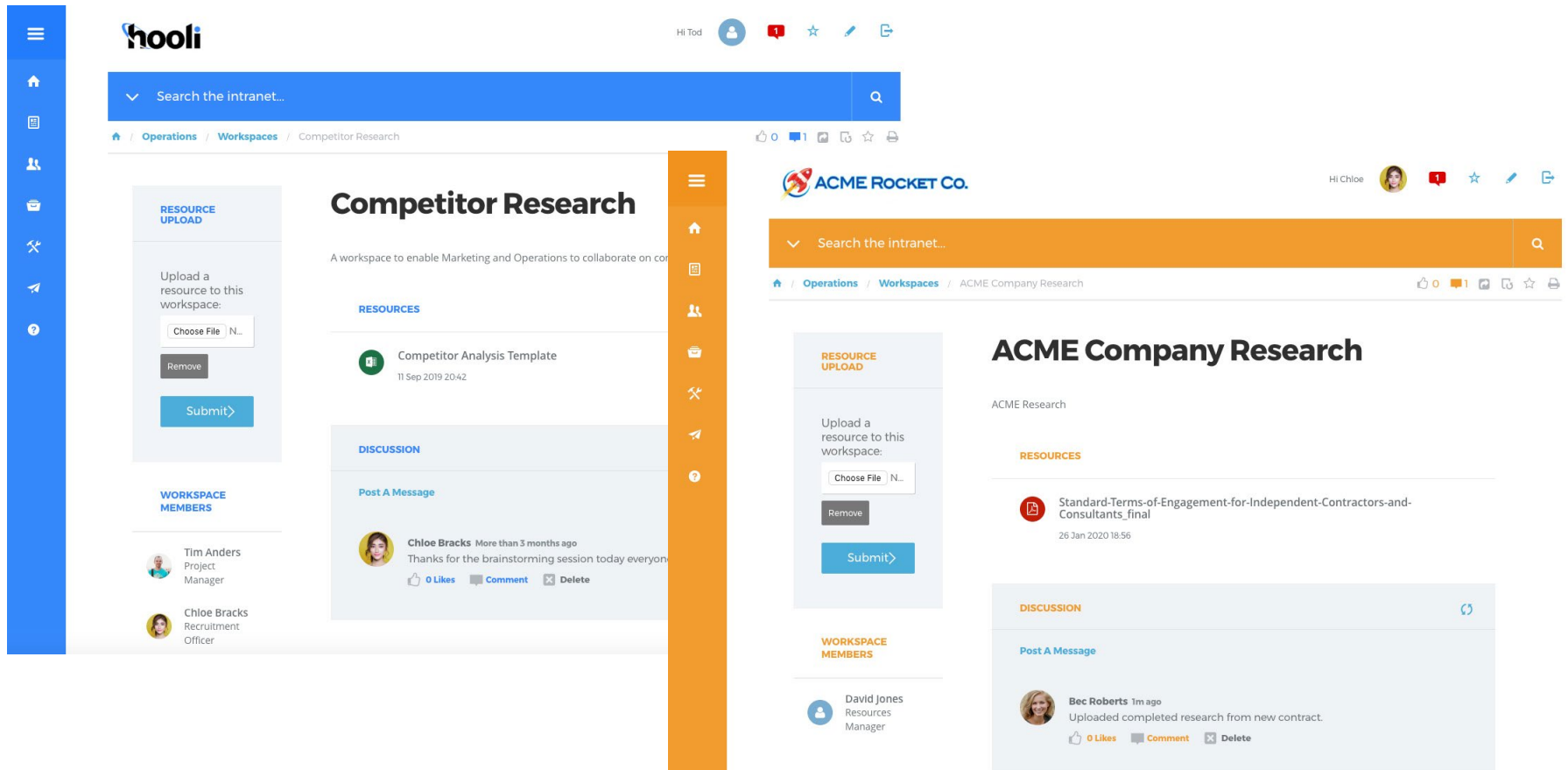


CENTRICMINDS DOCUMENT MANAGEMENT

Workspaces

Create secure & personalized user experiences.

CentricMinds allows you to create and manage document-driven experiences for your customers and partners. Create secure workspace environments for your external audiences to access and action document processes. Allow external users to publish documents securely.



Capture and action these documents using the native workflow management tools of CentricMinds. Brand your workspaces and provide a personalized experience for your customers and partners.

A hand is holding a smartphone, which is the central focus of the image. The phone's screen is lit up and shows a lock screen with the word 'UNLOCK' at the top, a fingerprint sensor icon in the center, and a 'Touch ID' label at the bottom right. The background is a dark blue night scene filled with out-of-focus, colorful bokeh lights in shades of orange, yellow, and blue. The overall composition is artistic and modern.

CENTRICMINDS DOCUMENT MANAGEMENT

Mobile

Your documents at anytime and from anywhere.

With the growing trend towards remote work, give your team the tools they require to securely view documents and action document related tasks from their phone and tablet. Users can perform searches, comment on documents and share documents with other team members all from within the native iOS and Android app.



For further information, please refer to the accompanying white paper on the CentricMinds native mobile app.



CUSTOMER & EMPLOYEE EXPERIENCES

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