cleardata®

Online Document Management

Our Solution

Cleardata's Online Document Management solution provides secure online electronic document and content management with fast, easy search and retrieval. The system offers;-

• Flexible document access from anywhere, using a web browser.
• Sorting & classification by category, attributes & users.
• Fast search functionality, including innovative key hook search, allowing you to search & view associated documents from other products, e.g. Sage, Excel, Word.
• User sharing workspace, with notes, tasks & project management.
• Version control and electronic audit trail.
• Integration with Outlook and Explorer.

Secure & Compliant

Cleardata is accredited to ISO27001 for Information Security. Our on-line document management system is provided on a SAAS platform (software as a service), delivered over the internet. Data is securely hosted in UK data centres, with best in class infrastructure. Records can be protected at a user level, using password protection.

Sort & Classify & index documents

Store and sort your electronic documents by category, attribute or user group. Index by any required key field. Fast search functionality, enabling users to find information easily.

Automated Workflow & Authorisation

Set up workflow to automate the flow of your documents. Claims, invoices, operational documents can be automated to go to the correct person in your business for approval or query.

Integrate with Outlook

Automatically add and classify emails to your on-line document management system on send, integrated with Microsoft Outlook.

Version Control & Audit Trail

Check documents in and out of the system. Provides full version control with comments at a user level, as well as a full electronic audit trail for your records.

Explorer Integration

Add explorer library to your computer, click add to document management system and index at the point of adding

Project Collaboration & Task Management

Easy to use shared workspace. Set up project groups, forums, discussions and news items to keep your project team up to date with relevant information. Assign tasks, workflow, delegate items and add files and documents associated with your project.

Scanning & Upload Service

You can scan, index and bulk upload your digital records at your premises or Cleardata can provide a service to do this for you. We operate a professional document scanning bureau, capturing over 3 million images each month.

information and records management **society** member

BSI UKAS QUALITY MANAGEMENT 003
Certificate Number: FS 505511

BSI UKAS INFORMATION SECURITY MANAGEMENT 003
Certificate Number: IS 541786

www.cleardatagroup.co.uk

Fast Search & Retrieval

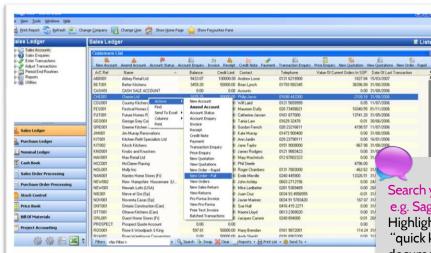**Flexible Search Functionality To Suit Your Business**
Cleardata's On-line Document Management System allows you to easily search your records:-

1. Search by **category** e.g. Invoices, HR, Sales, Production or Operational Records

2. Search by **indexed attribute** e.g. supplier name, document number, date

3. Search by **document type**

4. Save **your favourite searches** in your workspace, so you can find records easily and quickly

5. Key hook search –**allows you to search records stored from any other system**, e.g. Sage, Excel or Word.

Find & View Associated Documents From Other Products

Search your records from any other system.
e.g. Sage, Excel, Word.
Highlight a search reference, click your chosen "quick key" e.g. ctrl F4" and search all your stored documents. Associated documents will pop up for you to view.

www.cleardatagroup.co.uk