

Document Management

Powered by DocFinity for UW

Service Overview

UW-IT Enterprise Document Management

Document Management

Document Management provides enterprise-wide DocFinity services to UW departments.

Document Management provides users:

- > A secure cloud application with access using your UW NetID and [Two-factor authentication \(2FA\)](#)
- > Consistent User Interface and approach to handling all records
- > Flexibility with configuration
- > Solid records management functionality and secure document storage

Key Capabilities

- > **Upload:** offers a “Quick” (simple) upload function that supports single-item and batch-upload capabilities
- > **Index:** associate metadata to records and change field values using the “Simple Index” feature
- > **Search:** designed to search on any identified metadata that has been configured
- > **View:** view documents in both native format and PDF

Service Overview

Usage

- > Upload, index, search, and view documents in a secure cloud application repository

Tool

- > Powered by DocFinity

Cost

- > Offered at no cost to departments

Who can use this service?

- > UW staff and faculty

For more information:
See [Appendix](#) for DocFinity Learning Aids

Frequent Use Cases

- > **Manage Electronic Records:** Store, retrieve, and view electronic content securely.
 - E.g., personnel records, student records, financial records
 - On-campus scanning is available.
- > **Simplify Records Management Processes:** Search, identify, and hold records responsive to public records requests, litigation, and audits. Set document retention periods to automatically comply with UW Records Management policies.
- > **Store Scanned Documents:** Digitize and store documents with high-volume scanning capabilities.
 - On-campus scanning is available.
- > **Retain Electronically Signed Documents:** Offers an optional integration with our eSignatures service (powered by DocuSign).

Use Considerations

UW's Document Management is focused on securely managing electronic records in a central, cloud location for units across the University.

The following should be considered by units interested in using Document Management (DocFinity):

- > DocFinity lets users easily search and find records responsive to business needs.
- > Compliance is managed through automated records retention rules.
- > Records Management Services will work with units to ensure records are disposed of appropriately in compliance with legally approved records retention schedules.

Getting Started

Visit the [Document Management](#) page on it.uw.edu.

The following will be covered during the initial conversations with your team:

- > Which **documents** will be included?
- > What **document information** is needed so that each kind of document can be found through search?
- > Who will need to **access** the documents?
- > How will the documents **be used**?
- > What is the **retention policy** for each kind of document?

Start the onboarding process by submitting a [Document Management Interest Form](#)

General Contact Information

Document Management

IT website

- > [Document Management](#)

Forms and Support

- > [Document Management Help](#)
- > [Document Management Interest Form](#)

Creative Communications

The Creative Communications Scan Center provides secure, on-campus scanning of UW and UW Medicine documents.

- > [Scan Center](#)

UW Record Management Services (RMS)

To better understand your retention policies, refer to the RMS page to connect with an expert.

Records Management Services: [RMS - About Us](#) (includes contact information)

Appendix

Login and User Interface

Login, UI Overview, Customization, and Terminology in DocFinity

- > Login is simple, using your UW NetID credentials
- > Users can select preferences for some of the User Interface (UI) look and feel
 - Icons vs. menus
 - Visible panels and those locations, as well as the ability to move panels around and pick and choose which panels to display

DocFinity Screen Visual

This is the Search Workspace

The screenshot shows the DocFinity Search Workspace interface. At the top, there is a menu bar with 'DocFinity', 'WORKSPACES', 'PANELS', and 'BUSINESS PROCESSES'. Below this is a search bar and a 'Search' button. The main area is divided into three panels: 'Search' (left), 'Document Viewer' (top right), and 'Results' (bottom right). The 'Search' panel contains the text 'No searches available. An administrator can assign searches to you'. The 'Document Viewer' panel shows a document with a toolbar containing options like 'Save', 'Cancel', 'Print', 'Download', 'Export', 'Share', 'Zoom In', 'Zoom Out', 'Page Up', 'Page Down', 'Home', 'End', 'Close', 'Print', 'Download', 'Export', 'Share', 'Zoom In', 'Zoom Out', 'Page Up', 'Page Down', 'Home', 'End', 'Close'. The 'Results' panel shows a search result with a toolbar containing options like 'View Information', 'View History', 'View Details', 'Create Folder', 'Add to Folder', 'Remove Document', 'Start a Process', 'Print', 'Download', 'Export', 'Share', 'Zoom In', 'Zoom Out', 'Page Up', 'Page Down', 'Home', 'End', 'Close'. Red callout boxes with arrows point to various UI elements:

- Selecting new or changing Workspaces or Panels can be done via drop down selection from the top menu bar
- Help information can be obtained by clicking on the "?" icons
- Double clicking this top blue bar will make it collapse
- You can also click and drag the white dividing lines to resize panels
- Clicking the black triangle will minimize the panel
- This is a "Panel"
- You can click on the blue bar of a panel and drag it to move it to a different position

Document Management (DocFinity) Terminology

Functional Area	DocFinity Term	Definition
User Interface	Workspace	The DocFinity interface consists of a three-column workspace and individual function-grouped panels. A workspace is a set of panels related to a particular job function. The workspaces available align with what has been configured for the user. All users will have the Search Workspace. Users are able to select to display or hide panels and save or delete a custom configuration.
	Panel	Panels are arranged in columns according to their function. Column width can be resized. The panels available align with what has been configured for the user. Users are able to select to display or hide panels and save or delete a custom configuration and access rights assigned.
	Canvas	Essentially the entire white space of the DocFinity screen without panels.
	Preferences	The Preferences panel lets you set your own application preferences for viewing documents, displaying indexing settings, searching, and general application help text.
Upload	Upload File Window	Action selectable via the icon or drop-down menu. Can browse to select a file to upload using a file browser, click to upload file. Close window when finished.
Search	File type	DocFinity stores document in both native format and pdf format.
	Metadata (MDO)	Metadata object is associated with a document.
	Search methods	Search Panel opens with configured search capabilities. DocFinity can search in a variety of methods, depending on the configuration: category, template, checklist, stored procedure, fulltext, Boolean, tree hierarchy.
View	View Document	Action selectable via the icon or drop-down menu. Display the selected document in the Document Viewer panel.
Download	Download	Action selectable via the icon or drop-down menu. Downloads a copy of the document. Opens a system Save dialog.
Index	Index	Metadata associated with the selected document, or batch of documents. Used to search for a group/batch of documents. Action selectable via the icon or drop-down menu.
	Batch	A Group of documents with the same metadata associated for viewing or searching for a group of documents.