

# TechnologyOne ECM

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Release 4.02

One vision. One vendor. One experience.

## Korynne Karlau

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Commercial in confidence January 2011



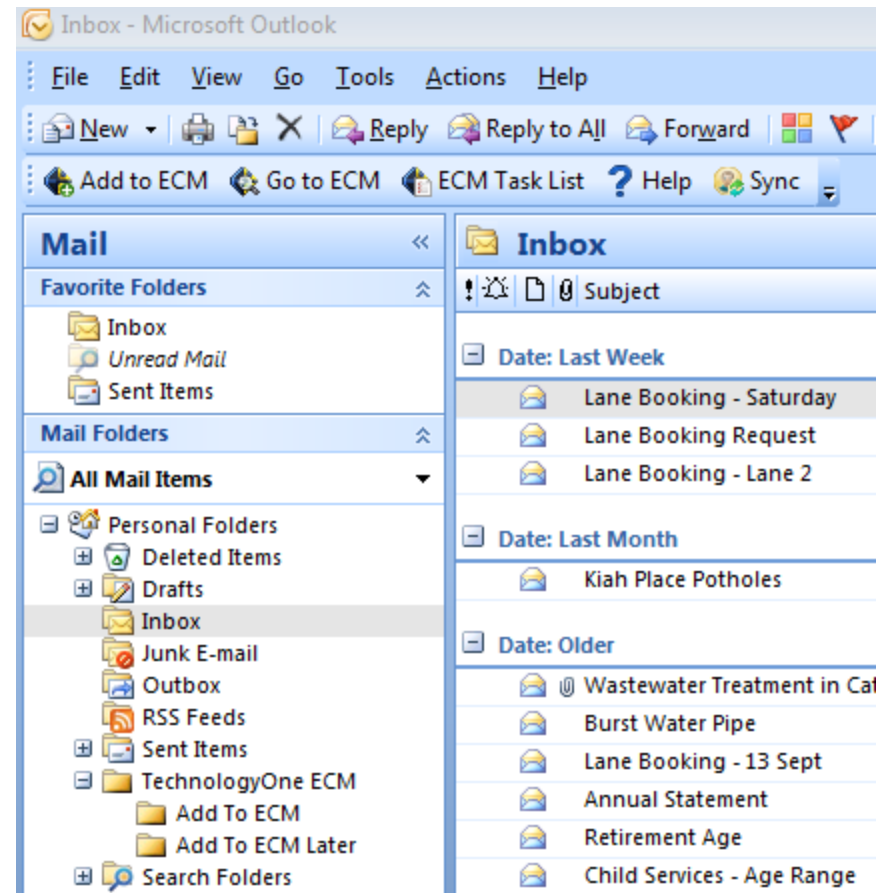
**technologyone**  
business software solutions

- Allow users to work where they live
- Minimise user input, while maximising records value
- Take advantage of TechnologyOne development platform



- Enhanced Integration
  - Outlook
  - MS Word and Excel
  - Windows Explorer
- Quick Add Profiles
- Document Search
- Connected Intelligence (Ci) Platform
- XLOne Reporting
- VERS Compliance

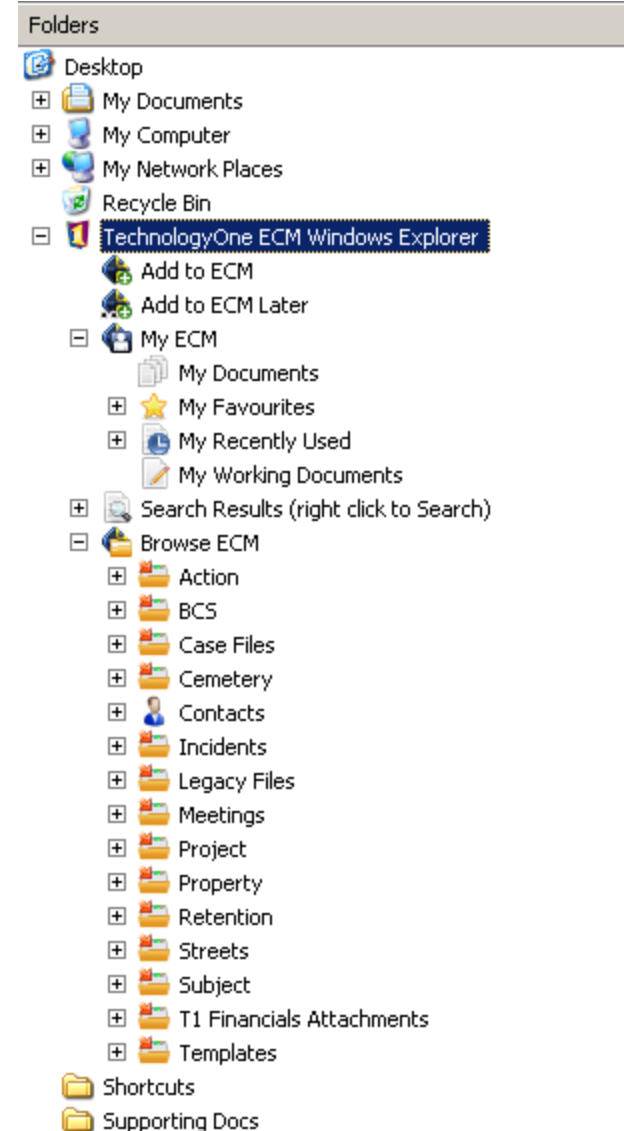
- Drag and drop folders
- Updated toolbar
- Single click to Search ECM
- Single click to ECM Task List
- Emails saved in .msg format
- Uses Quick Add Profile form for registration



- Simplification of toolbar options
- Available in Word and Excel
- Updated toolbar with simplification of terms
- Uses Quick Add Profile form for registration
- Save policy settings for Office Save command



- Drag and drop Add to ECM folders
- Updated toolbar
- Single click to Search ECM
- Single click to ECM Task List
- More User functions available for documents
- My ECM includes My Documents
- New Browse option for Indexes
- Uses Quick Add Profile form for registration



Add To ECM (Maintain) - TechnologyOne

help clear

### Add To ECM

Document SetID:\* 4489 Retirement Age

Quick Add Profile ID:\* 1 [Default](#) [My Default Quick Add Profile](#)

#### Document Files

Message (19 KB)

#### Document Details

Document No: 4996 Document Date: 27/04/2012 12:26:19 PM

Date Received: 27/04/2012 12:26:25 PM Class Name:\* ALLSTF - All Staff Access

Description:\* Retirement Age

Internal Reference: External Reference:

Author: Peter Demos Responsible Officer:

Version: 1 Date Registered:

Registration Officer: 24 Hill, Jordan Call Type:

#### Contacts [1]

<input type="checkbox"/>	Description	Street Address	Suburb
<input type="checkbox"/>	<a href="#">Demos, Peter</a>	20 Florence Avenue	DENISTONE NSW 2114

[Find Contacts](#) [Remove Contacts](#)

#### Subject [0]

[Find Subject](#)

[More Actions](#)

Add to ECM Add to ECM Later Cancel

Process Promptly  
—  
Profile Properly

The image shows two side bars from a software interface. The top bar is titled 'Actions to Perform' and contains a list of actions: 'Add to ECM', 'Add to ECM Later', 'Forward To', 'Cancel', 'Add Index Link', 'Add Notes', and 'Add Tasks'. The bottom bar is titled 'Sections to Display' and contains a list of sections: 'Document Files', 'Document Details', 'Contacts [1]', 'Subject [0]', 'Notes [0]', and 'Tasks [0]'. At the bottom of this bar are controls for 'Expand All', 'Collapse All', and a 'Find' search icon.

- Quick Add Profiles
- Favourites
- Recently Used
- Actions to Perform

The image shows a side bar titled 'Quick Add Profiles'. It includes a search box and a list of profiles: 'Funding - Creative Schools', 'eNewsletterSubscription', 'Policies', 'Work Experience', '(Default) Default', 'Claims', 'Potholes', 'Road Closures', 'Standards', '(Default) Recreation', 'Youth Centre', 'Swimming Pool', 'School Curriculum', and 'NRSR Incident'. On the right side of the bar are three icons: 'Quick Add Profiles', 'Favourites', and 'Recently Used'.

The image shows a side bar titled 'Favourites'. It includes a search box and a list of items: 'Quick Add Profiles', 'Work Experience', 'Index Entries', 'Application: S000006/10', 'Subject: Youth Centres', 'Subject: Applications', 'Subject: Permits', 'Project: Feasibility Study', 'Customers', 'Action: Placement Requests', 'Documents', 'Re: FW: Robe Quote from Buil', 'PP0019/2011 - Residential Pa', 'Re: Fence Dispute - Assistanc', and 'Aquatic Centre - Info Sheet'. On the right side of the bar are three icons: 'Quick Add Profiles', 'Favourites', and 'Recently Used'.



The screenshot shows a browser window with the TechnologyOne ECM application. The browser's address bar shows 'TechnologyOne ECM'. The application header includes the logo and navigation links: Home | Log Out Jordan | Maintenance | Hide Logo | Help. A sidebar on the left contains two main sections: 'Home' with links for Search, Task List, Import Document, New Request, and Clipboard; and 'Forms' with a search box and links for Building Enquiries, Fleet Management, Health and Safety, Help Request, Permit Submission, Training Request, and Work Request. The main content area features a 'Full Text Search' section with a search input field, a 'Search Documents Only' checkbox, and a 'Retrieve' button. Below this are radio buttons for date ranges (All dates, Last week, Last month, Last year) and date pickers for 'From' and 'to'. There are also dropdown menus for 'Registration Officer' and 'Responsible Officer', both currently set to '<None>'. A 'Search by' section lists various categories: Document, Contacts, Subject, Project, Property, Application, Action, and Templates, each with a corresponding icon. A callout box highlights the 'Document' category.

The 'Search List' dialog box is open, showing search criteria for the 'Document' category. It includes the following fields and options:

- Description:** Three text input fields and a checked 'And' checkbox.
- Class Name:** A dropdown menu currently set to '<None>'.
- Document No:** A text input field.
- Date Registered:** Two date pickers in the format MM/DD/YYYY - MM/DD/YYYY.
- Document Date:** Two date pickers in the format MM/DD/YYYY - MM/DD/YYYY.
- Registration Officer:** A dropdown menu currently set to '<None>'.
- Author:** A text input field.
- Internal Reference:** A text input field.
- External Reference:** A text input field.
- Call Type:** A dropdown menu currently set to '<None>'.
- Document SetID:** A text input field.

At the bottom of the dialog, there are buttons for 'Retrieve' and 'Clear all'.

# ECM Connected Intelligence (Ci) Interface

technologyone

The screenshot displays the ECM User interface within a browser window titled "ECM User - TechnologyOne ECM - Training Database direct". The interface includes a menu bar (File, Edit, View, Tools, Actions, Window, Help) and a navigation bar with tabs for "Home", "Activites I Perform", "More", "P&R Activities", "AP", and "Asset Details". A secondary navigation bar contains icons for "Home", "help", "close", "clear", "refresh", "show available portlets", "page layouts", and "print screen".

The main content area is titled "BI Dashboard" and features two portlets:

- Alerts Portlet:** Lists several alerts with information icons:
  - You have [2 active ECM Tasks](#)
  - You have [1 overdue ECM Task](#)
  - There are [0 Requests](#) at maximum escalation level (Property and Rating)
  - There are [0 events](#) due for completion (Property and Rating)
  - There are [0 applications](#) due for completion (Property and Rating)
- Published Reports Portlet:** Includes a dropdown menu for "Arrange by:" set to "Most Recent" and displays "No Items". It has "Preview" and "List" tabs and a "Configure KPI Portlet" link.

At the bottom of the Alerts Portlet, there is a "Configure alerts displayed" link and a "Refresh Rate" control set to "15 Minutes".

The left sidebar contains navigation options: "Drag and Analyse", "Favourites", "Search", and "My Personal Workflow". The bottom status bar shows "ALERTS", "5 Information", and "0 Workflow". The Windows taskbar at the very bottom includes system icons and application shortcuts.

The screenshot shows the 'ECM System Administrator - TechnologyOne ECM - Training Database' application window. The menu bar includes File, Edit, View, Tools, Actions, Window, and Help. Below the menu bar are tabs for 'Manage System', 'ECM System Administration', and 'Reports'. The 'Reports' tab is active, displaying a sidebar with 'Reports', 'help', 'close', and 'refresh page' buttons. The main content area is divided into three sections: 'XLOne Reporting' with a sub-link 'Run an XLOne Schedule'; 'ECM Reports' with a list of 11 report titles; and 'ECM Audit Reports' with a list of 3 report titles. A vertical sidebar on the left contains icons for 'Drag and Analyse', 'Favourites', 'Search', and 'My Personal Workflow'.

## XLOne Reporting

[XLOne Reporting](#)  
[Run an XLOne Schedule](#)

## ECM Reports

- [Classifications Report](#)
- [Classifications Rights Report](#)
- [Documents Not Linked to Customer Index Report](#)
- [Documents Registered per Quarter Report](#)
- [Documents Registered Report](#)
- [Outstanding Tasks Report](#)
- [Security Group Membership Report](#)
- [Sent Tasks Report](#)
- [View Rights Report](#)
- [View, Classifications and Other Rights Report](#)

## ECM Audit Reports

- [Document Event Report](#)
- [Index Event Report](#)
- [Audit Access Event Report](#)

- ECM Reports provided in XLOne format
- ECM standard reports now include 3 audit reports

## Dashboard Portlet

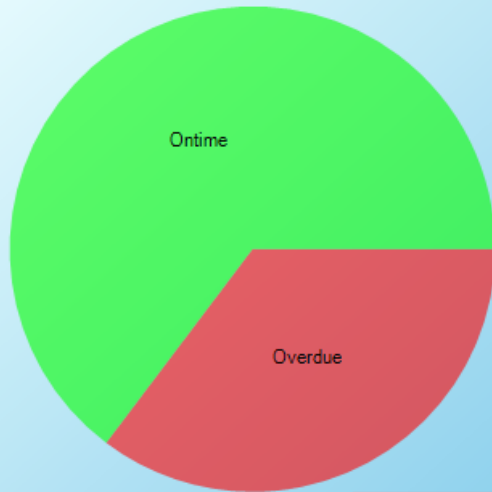
Documents Registered

49

*ECM Reports*

*Audit Reports*

Tasks - Ontime / Overdue

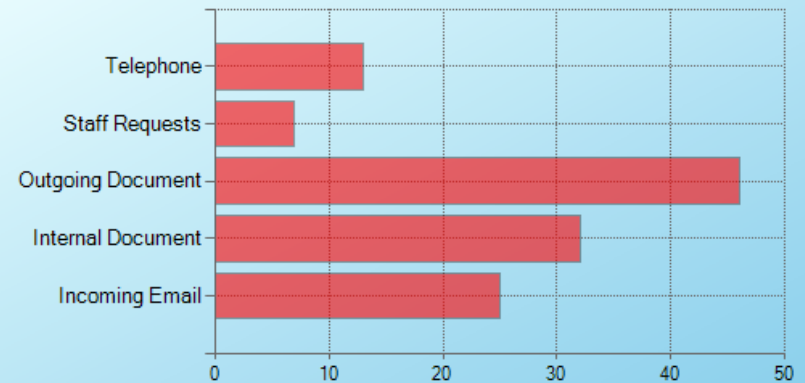


Outstanding Tasks Report

Documents Registered by Quarter



Documents by Type



- Simplification of Terminology
- Batch Printing of Documents
- Forwarding Registration to Groups
- Auditing of Index and Document Notes
- Browser View Tasks
- Browser Send as Task
- Removal Panoramic Viewer for Windows

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