HDMS

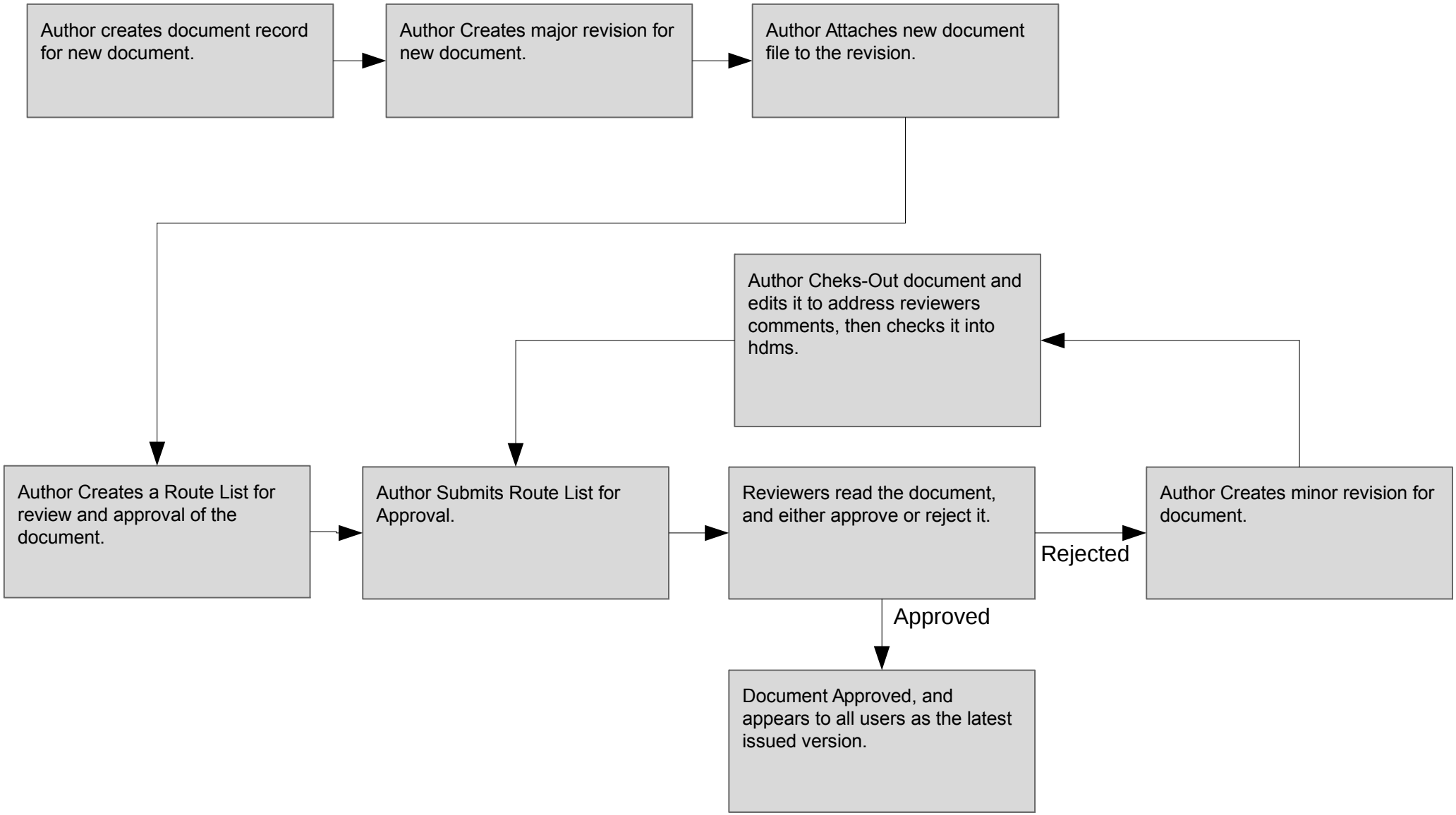
Hartlepool Aspire Trust Document Management System Overview

Document Management System Concepts

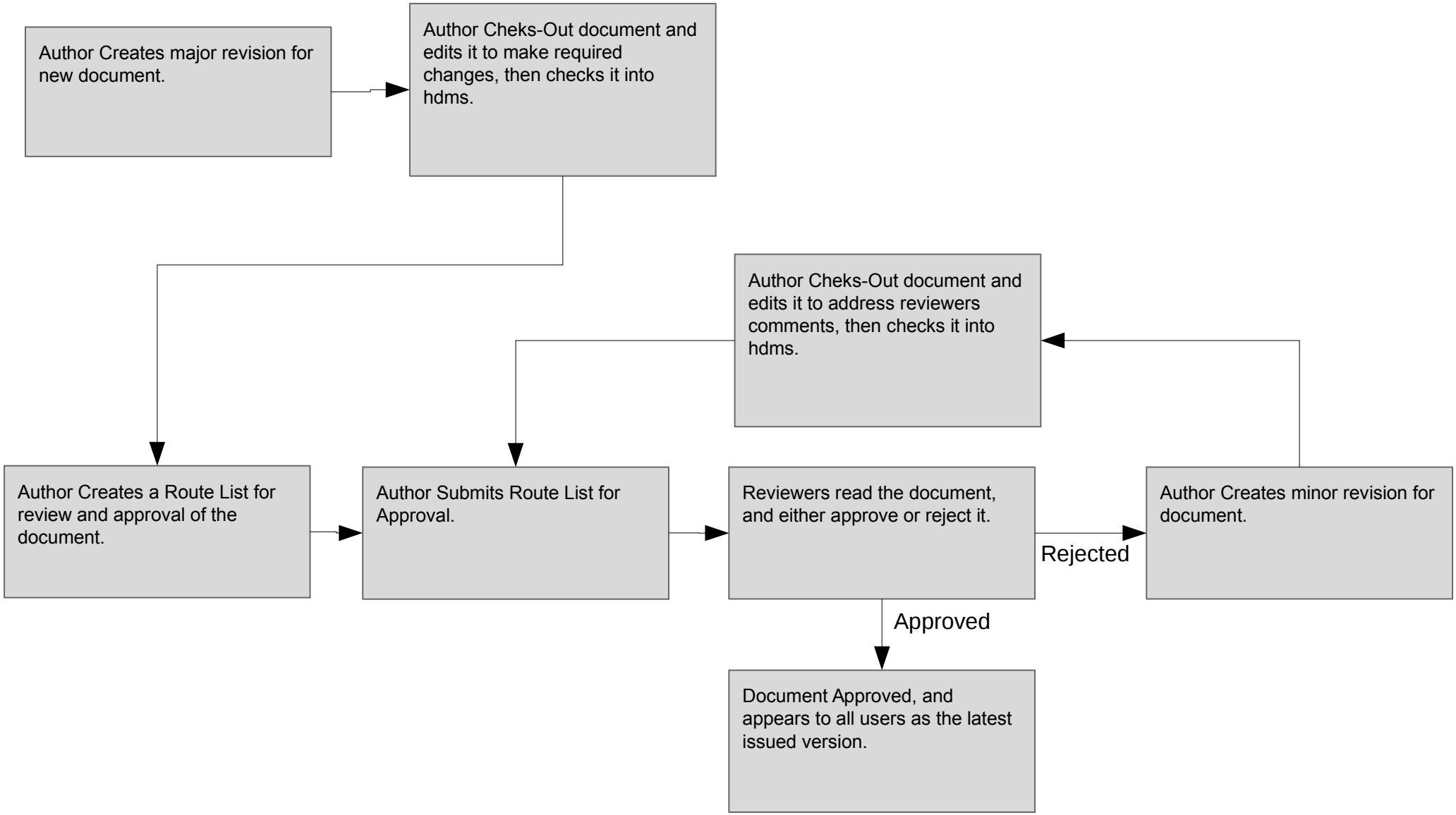
- This document describes the electronic Document Management System used by Hartlepool Aspire Trust.

- The following concepts are important to understanding the system:
  - **Document:** the basic record describing a document - title, document number, document type etc. A document can have multiple revisions, which are different version s of the document.
  - **Document Type:** High level type of document - Policy, Procedure, Form, Record.
  - **Document Sub-Type**: second level of document type - could be Finance, HR etc.
  - **Revision:** A record describing a particular version of a document - it has a major revision number, which is the revision number of the issued document. It can also have a minor revision number, which is used for draft versions between major revisions. A revision is approved by associating it with an approval route list. Only one Revision of a document can be at 'Approved' status. If a new revision is approved, the previous one goes to ' Superseded' status.
  - **Route List:** A route list describes the review and approval of a document revision by a number of people. Each reviewer can either approve or reject the revision. The revision is approved for issue once all of the reviewers on the route list have approved it.

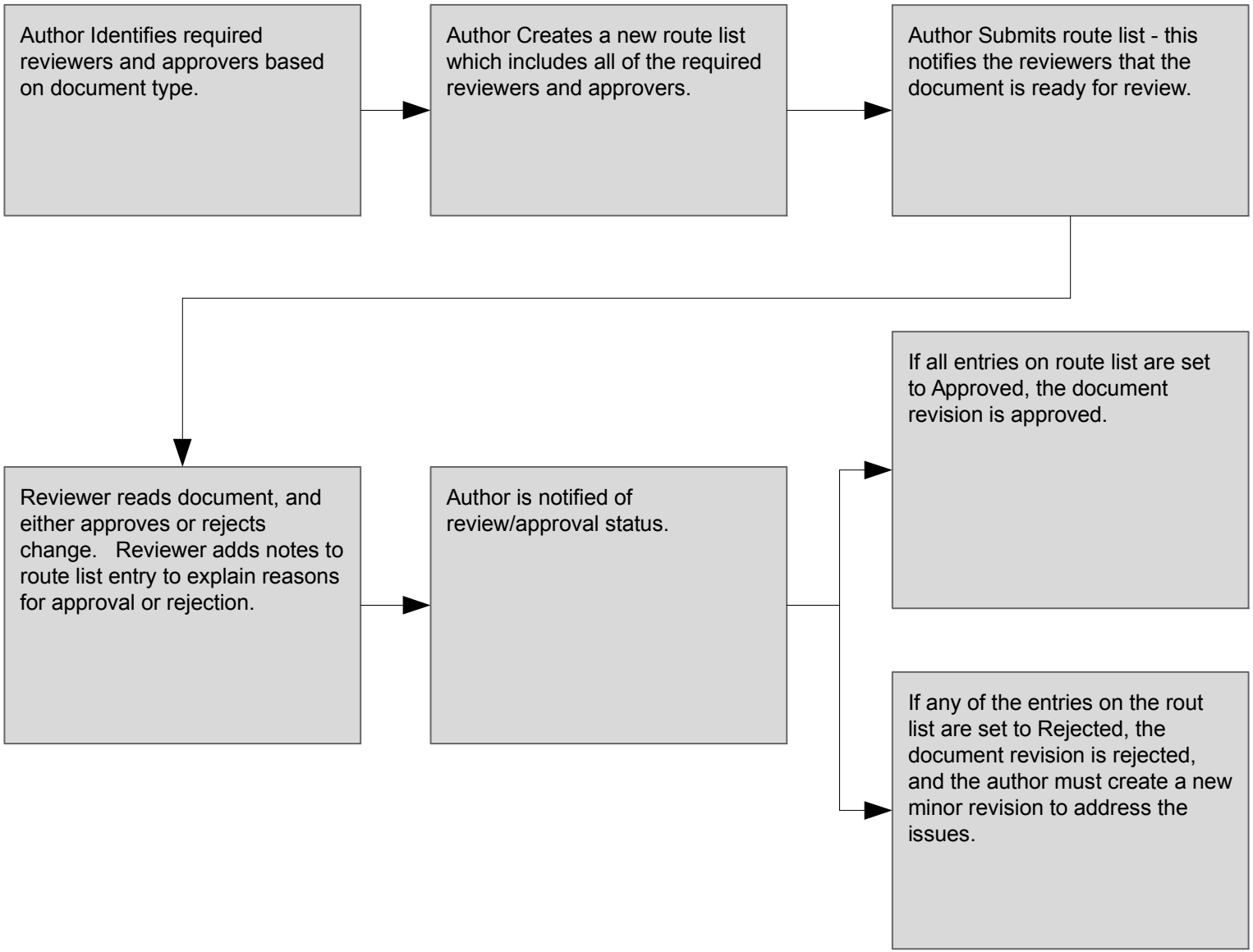
Work Flow - New Document



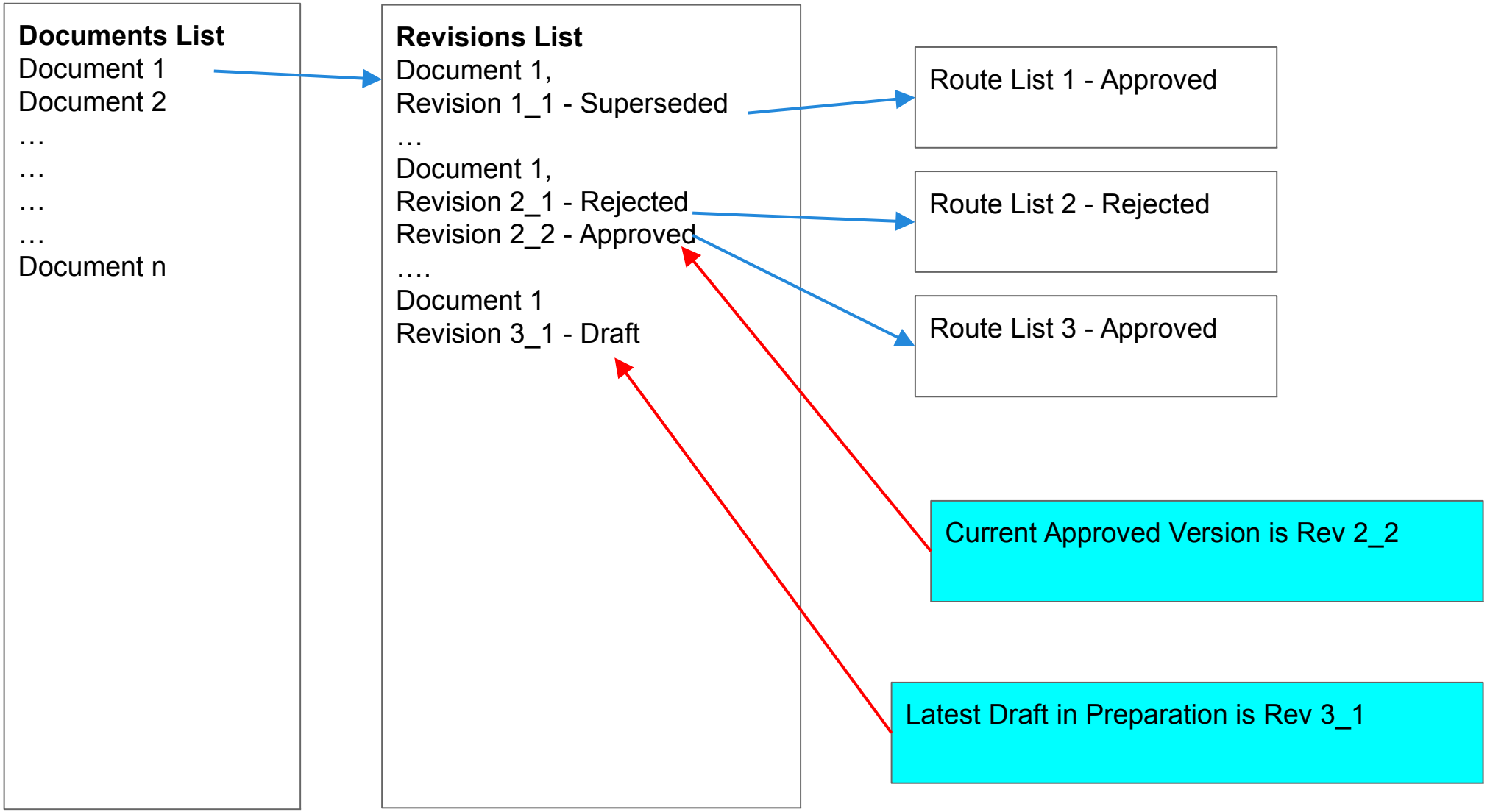
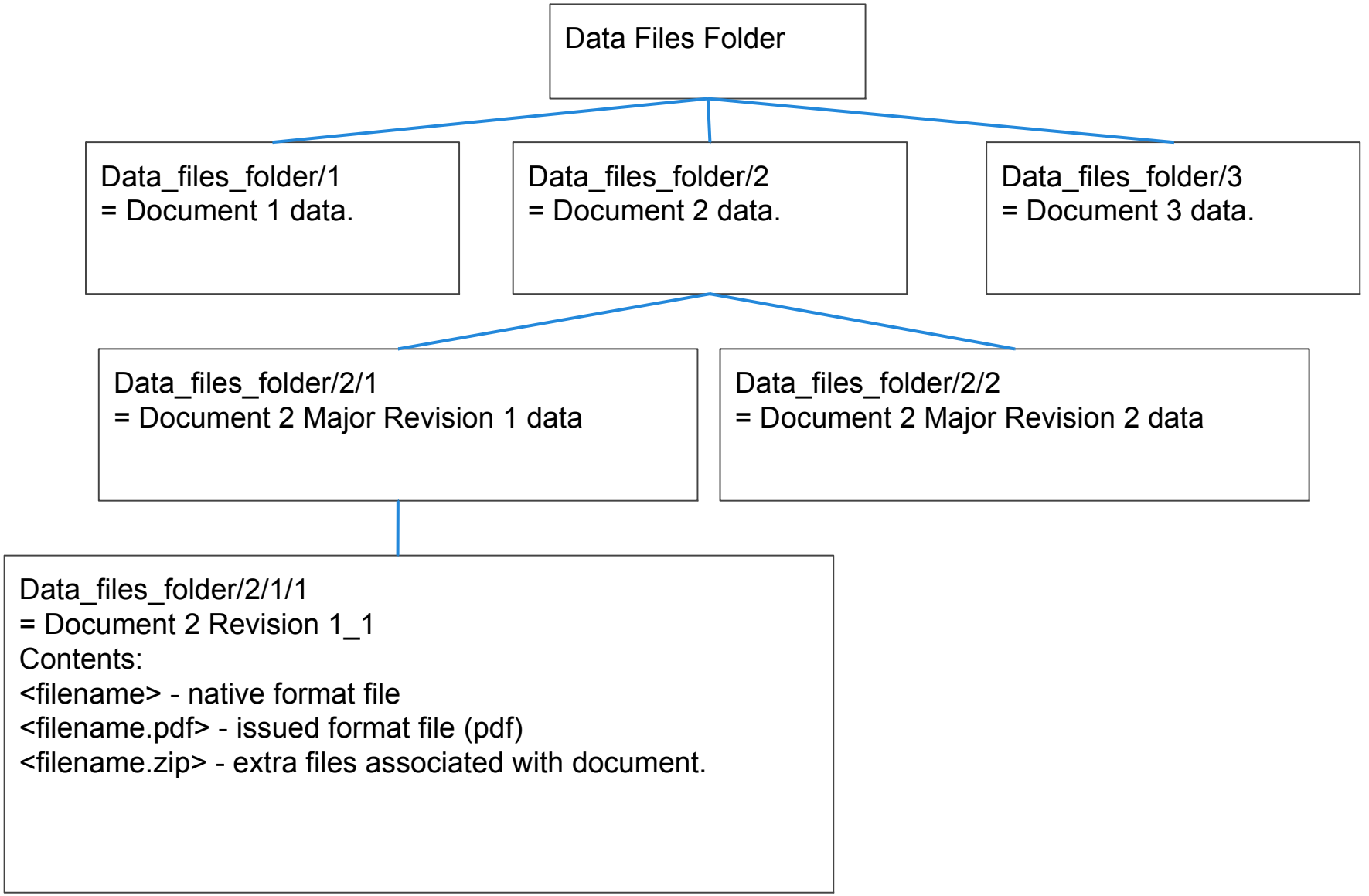
Work Flow - Existing Document



Work Flow - Route Lists



Data Structure



File Structure