Dossier Management

Easy to store, quick to find and retrieve

Standard Solution to Tailor Fit your dossier needs

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'Who has my document?'
The challenges in document management

Where to find documents? Where are they stored?

How can I simply find correlated content?

I want to see the content around a specific entity or attribute – contract/project

There must be an easier way to store this, right?

How can we be compliant GDPR, SAS, ISO?

Why can't we store this together in one logical place
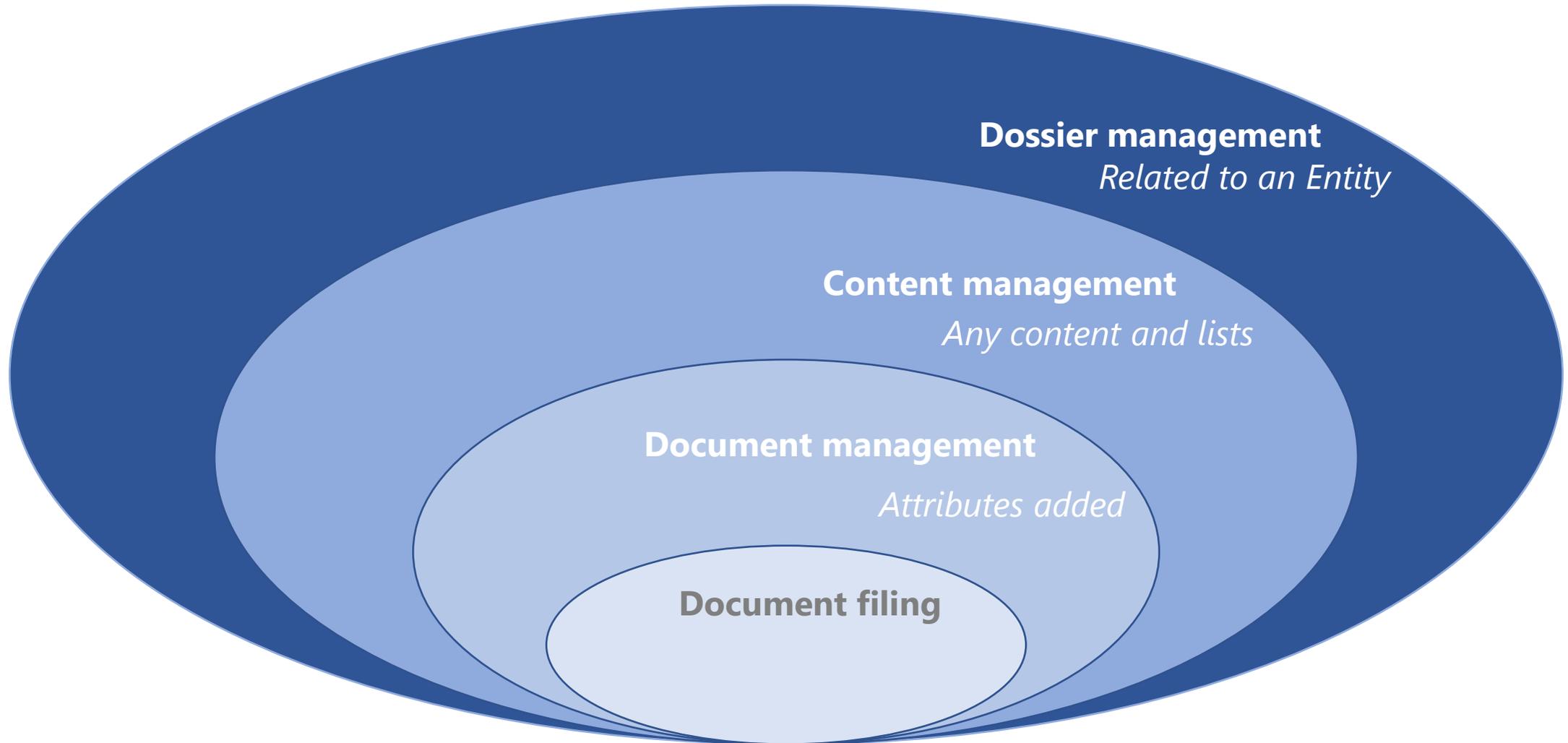
And what about e-mail? How can I access that?

The need for secure central storage, that is accessible, is very high

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Challenges; Complete and Correct

- Making sure a complete and up-to-date dossier is in order can be challenging

- A well managed dossier will assist you in validating and proofing completeness

- Managing content types and security is key

- Automatic versioning for revising documents

A tool that works with you to save time

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Towards dossier management with documents

Dossier management
Related to an Entity

Content management
Any content and lists

Document management
Attributes added

Document filing

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2Share's Dossier Management works for you

Easy to use connection between the documents and the entity you choose

User friendly way of labeling (tagging) the documents with metadata

Cloud solution, accessible anywhere, any time, any device

Fast and easy filtering on any metadata field you have

Hassle free interface to upload all kinds of documents in the dossier with tagging

Scalable, secure and low maintenance

Easy creation of new documents, using company templates

Based on Microsoft SharePoint, the world's standard in document management

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On Top of the Leading Platform

Leading in the Gartner Content Services Platforms Magic Quadrant

- ▪ SharePoint as the solid basis, for robust document management
  - ▪ Flexible, secure, GPDR compliant, audit trail, version management, easy integration with other applications, pay-per-use, API

- ▪ Beyond SharePoint with Dossier Management
  - ▪ Connection between the entity of choice and the documents-library
  - ▪ Configurable filter components that provide an intuitive and user-friendly interface
  - ▪ Automated attributes of documents with the filters applied on the upload
  - ▪ Easy creation of documents using the templates including automated attributes

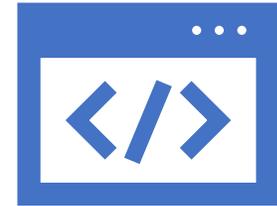**2Share**
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Okay, but what is it, exactly?

A super friendly way to organize content, built on top of your Teams/SharePoint/MS365 Documents and other Content

A rich toolbox to leverage Content Management that is easy to deploy and configure to tailor to your specific needs

A set of modern, interconnected Webparts to place on a Page and configure to your needs in such a way the desired functionality in the page works as one solution

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Examples

Implementation examples and User Interface

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Customer Overview

Create customer
Click on the button and fill in the form

Create contact
Click on the button and fill in the form

Customers +

Search

Company ↑	Country,	Address	City
2Share	Curaçao		
Building Company Ltd.	USA	Kaya Wawa Scholz 43	
Exquisite catering	Equador		
InDeed			
Manufacturing Ltd	NL		Haag
Manufacturing Ltd2	Colombia		Azula
Ration			
Transit expo Ltd	Brazil		Olestar

Optionally Find the customer by typing a few letters.

Click on the customer you want to select

Customer Contacts +

Search

Full Name	Customer	Country/Region	City
Arnd Brugman	2Share		
Fokko Scholma	2Share		
Tupak Rosario	2Share		
Joost Giebels	2Share		
Nick Andriessen	Building Company Ltd.		
Ray Greers	Universal Highschool	North America	Miami
Juliana Velasquez			
Roger Greer	Manufacturing Ltd2	USA	Miami

Associated Contacts to filter

Customer Region

Select Customer Region

Example of a filter, here specifically for region

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Managing the Dossier 1/2

Managing the Dossier 2/2

Customers +

This shows the selected customer

Company ↑	Country/Region	Address	City
2Share	Curaçao	ChuChi	Willemstad
✕ **Building Company Ltd.** 📕 📝 North America	USA	Kaya Wawa Scholz 43	NY
Exquisite catering	Equador		Santa Antas

Search

Text	Docume		Dates	I◁ Today ▷I
Filter	Select Type	⌄	From	📅

With this button, you get a preview of the document

With this button, you can edit the metadata of the document

Sort on any attribute in the header

Documents + 📄 Customer ✕ Bu...g Company Ltd.

Add a new document to the Library. Filters will apply.

Title ↑		Content Type	Customer	Date	Size
Application N...f	🖼 📝	InternalMemo	Building Company Ltd.	Reference 2021-02-01	474.76 KB
Document 2 Building Company Ltd..docx	📄 📝	Document	Building Company Ltd.	Reference 2021-06-09	0 B
Internal m...	📄 📝	InternalMemo	Building Company Ltd.	Reference 2021-01-06	1.06 MB
Le...	📄 📝	Document	Building Company Ltd.	2021-02-17	52.64 KB
te...	📄 📝	Proposal	Building Company Ltd.	Reference 2021-06-09	22.19 KB
template_20210609_Building Company Ltd._Dat...	📄 📝	DatedStatusDocument	Building Company Ltd.	Reference 2021-06-09	20.79 KB
template_20210609_Building Company Ltd._Pro...	📄 📝	Proposal	Building Company Ltd.	Reference 2021-06-09	22.16 KB

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Different Example: Leads Management

Customers +

Search

Company ↑		Country/Region	Address	City
2Share		Curaçao	ChuChi	Willemstad
Building Company Ltd.		USA	Kaya Wawa Scholz 43	NY
Exquisite catering		Equador		Santa Antas
InDeed				
Manufacturing Ltd		NL	2 First Street	Haag
Manufacturing Ltd2		Colombia	12 First street	Azula
Ration				
Transit expo Ltd		Brazil	22 Front street	Olestar

A different setup, a familiar interface. This Leads Management system uses a specific configuration of filters and content to demonstrate the broad use of the Solution. Note that this is done without any programming, this is done by just a configuration of filters and content

Filter text in Title

Text

Filter

Lead status

Select Lead status

Lead Owner

Select Lead Owner

Examples of a dynamic filters

Sort on any attribute in the header

Leads +

Title		Customer	Status	Owner	Amount	Chance	Amount Wgt ↓
SharePoint implementation		Universal Highschool	Prospect	Fokko Scholma	25,000.00	31.50%	7,875.00
Power BI management reports		Exquisite catering	ProposalAccepted	Joost Giebels	75,000.00	45.00%	33,750.00
Teams set up		Building Company Ltd.	ProposalSent	Arnd Brugman	35,000.00	71.39%	24,985.00

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Multi-purpose, defined by your Entity

The example shows Dossier Management set-up for easy Customer relationship management (CRM). However, the solution can be used for each dossier-type that you have.

You choose the entity and context that fit your needs, some examples worth mentioning

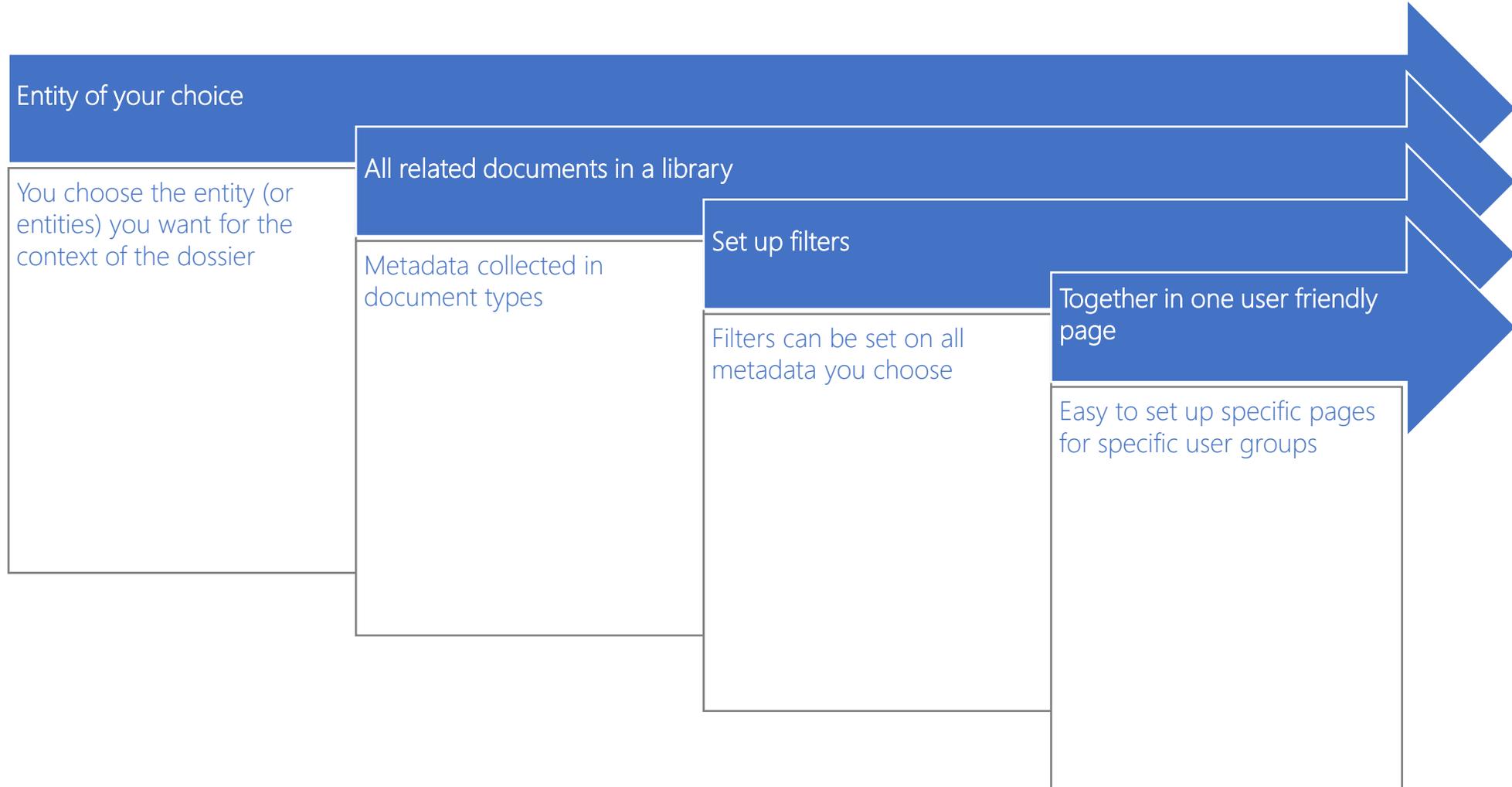|	
HR Dossier	• Contract, Salary slips, IDs, Annual assessments
Project Dossier	• Contracts, Reports, Design, Documentation
Easy Customer Relationship Management (CRM)	• Correlate Customers, Suppliers, Invoices, Purchase Orders and Projects • Add Pipelines, Leads, Tasks, Notes, etc…
Real Estate Dossier (Physical Assets)	• Leases, Maintenance, Descriptions, Contracts
Application Dossier	• Personal Loan, Bank Account, Mortgage
Tracking and Handling Dossier	• Container, Ship, (Semi)Truck or Lorry

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Flexible implementation in your organization

Entity of your choice

You choose the entity (or entities) you want for the context of the dossier

All related documents in a library

Metadata collected in document types

Set up filters

Filters can be set on all metadata you choose

Together in one user friendly page

Easy to set up specific pages for specific user groups

Configurable modules
No coding needed, just set up the entity, library, document types and configure the modules on a user specific page

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Quick start; Ready for use in just a few weeks

Use
- Training
- Go Live

Acceptance
- Check for fit
- Walk-through manual

Set up & Configure
- Entity
- Document types
- Libraries & Lists
- Pages

Design
- Type of dossier
- User pages
- Security

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Dossier Management

Digital Transformation beyond Document Management

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