UniPhi

Document Management Training

Learn how to generate professional documents and share large files collaboratively with UniPhi's Documents module.

Document Management the UniPhi Way

The documents module in UniPhi is not just a document repository for storing files but is also a document generator for reports and communication with external stakeholders.

Information stored and managed in other modules can be integrated into one communication efficiently.

UniPhi automates version control, manages view and edit rights and allows for a QA process work flow for sign off.

The results: find what you're looking for quickly and easily. Store, create and manage documents in one convenient location. Don't waste time on repetitive data entry, enter information once, reuse and recycle as needed.

UniPhi software's automated meta data capture and version control functionalities increases productivity. Find out how!

At the end of this session you will be able to:

1. Follow the recommended document collaboration process for design drawings
2. Create a automated status reports
3. Explain how version control works and how to revert to previous versions
4. Describe the view, edit and sign off rights model
5. Utilise a variety of stylesheets to get the right PDF output for your document
6. Email documents and track communication on that document
7. Generate documents OnSite, using UniPhi's mobile apps

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At the completion of this course, attendees will be generating documents, sharing information and managing sign off
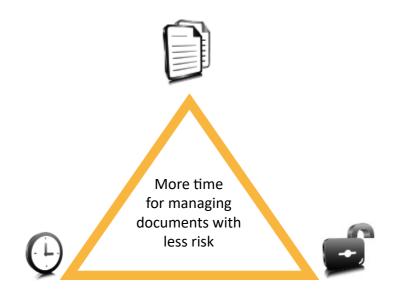
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	Team Member	Program & Project Manager	Administrator
For a project			
Create, Edt and View UniPhi Documents	✓	✓	✓
Automated Version Control	✓	✓	✓
Email Documents and Capture Transmittal Logs	✓	✓	✓
Comment in Documents	✓	✓	✓
Set Document Due Dates			✓
Across portfolios or programs			
View Documents Filtered by Template Type, Catagory, etc.	✓	✓	✓
Methodology			
Establish Role Based Governance			✓
Create Document Templates Including Sign Off Following Governance			✓

More time for managing documents with less risk

Administration and Costs

Course Fee: $250 ex GST - 4 Hours

All prices, unless otherwise stated, include materials, marking of assessments, luncheons and/or teas and coffees for attendees.

Payment can be made by cheque, credit card or direct bank transfer.

Dates: Please visit http://uniphi-software.com/training/ for the latest training dates at a location near you.

Training Method: This course is a computer based training course. We recommend bringing your own laptop with access to your own data for best results but we can provide equipment if needed.

Enrolment: You can enrol online at http://uniphi-software.com/training/ or via email info@uniphi.com.au with the name, date and location of your course. A confirmation of enrolment will be emailed to you once funds for the course have been receipted.

Cancellations: Users cancelling their attendance two weeks prior to a course will receive a full refund. Later than this will receive a 50% refund

Other Conditions: UniPhi reserves the right to cancel or discontinue any course for whatever reason. In this event, delegates who may have registered for such a course will be informed and all fees will be refunded in full.

On some courses, the number of seats are limited and acceptance will be based on a first-come, first-served basis.
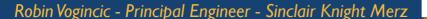
UniPhi reserves the right to make changes to the course syllabi, schedules, fees and venues to meet changed circumstances. However, UniPhi will make every effort to communicate any changes to our clients as early as possible.
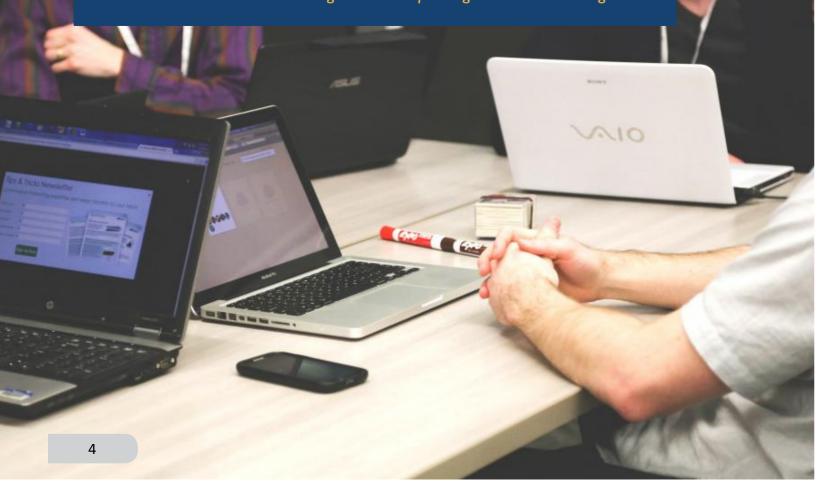
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We have been using UniPhi's 'Save as Document' feature for a number of years now, and we've found it saves us an incredible amount of time.

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The paperless system offered by UniPhi removed the need for dedicated administration assistants resulting in an estimated saving over the program of about $5 million.

Robin Vogincic - Principal Engineer - Sinclair Knight Merz