

Document release: configuration and process

This document gives you a brief overview about some issues you should keep in mind for the setup and application of the document release process.

The following settings have to be made in advance in order to support the release process by DigtaSoft Pro.

AdminSetup

1. Definition of release status

In the setting → document release the quantity and the names of up to 10 possible release states have to be defined. The first (release status 1) and the last (release status 10) must be defined.

2. Activating document release

Activate the release of documents in the AdminSetup under
Settings → Network configuration

There you also can define after how many days the protocol-data should be erased automatically.

3. The folder in which the written documents are stored must be available for all those users, participating in the document release process. Normally this folder should be saved on the network. For those creating documents, the following path must be defined

Settings -> Standard-text program ->

Create corresponding text file ... ->

default folder for the filing of documents

Note:

The release process of documents is possible in connection with DSS- or DSS Pro-files only.

Description document release process

Role		Dictation status
Author (originator of dictation)	1. Create / dictate dictation	„Started“
	2. Finish / close dictation	„Dictated“
	3. Transfer dictation to secretary or pool	„Sent“
Typist	1. open dictation / load in the player The automatically opening of the text program requires the appropriate configuration in the settings.	„Sent“
	2. Save document - give document a name - define the storage location Note: Save the document in a folder in which all participants have read- and writing memory rights.	„In progress“
	The standard writing program opens. The dictation now can be written.	
	3. Close document or dictation and press the “document release” button.	
	The document release dialog opens.	
	4. Select release status	
	5. Select the addressee Here the recipient has to be selected who is the next to release the document.	
	Remarks: Here persons who shall release the document at next can leave a message / note.	
	6. Release The dictation <u>must</u> be attached when the selected addressee is not the author of the dictation.	„In progress“ (The dictation is deferred to the “sent” folder)

	<p>The message box window “monitoring document information” opens when a new document to be released comes in, and gives information where to find the dictation. This automatic message must be activated individually for each user.</p> <p>In general, the dictation (incl. document-link) is saved in the folder:</p> <ul style="list-style-type: none"> - „Sent dictations“, if the addressee is also the author of the specific dictation - when it was sent before. - „Inbox“, when the dictation has been attached. This always is necessary when the addressee receiving the release demand is not the author of the dictation. 	<p>„In progress“</p>
<p>Author (addressee selected by the secretary)</p>	<p>1 A. Opening of document in the folder „Sent dictations“ - click with the right mouse button on the specific dictation and then select the option “view document”. Only the document will open after this.</p> <p>1 B. Open document by double-click Alternatively, the dictation together with the document can be opened by a double-click. Firstly, defer the dictation to the folder “My documents”.</p>	
<p>Proofreading of documents. Now the document can be changed as desired.</p> <p>Note: The file name of the document can be changed but not saved in a different folder. Close and save the document after completion of all requested changes.</p>		
	<p>2. Release of document - click with the right mouse button on the specific dictation and then select the option “release document”. The window for the “document release” opens. Now please follow the instructions stated above.</p> <p>Note: - The selection of a lower release status than the current status is not possible. However, it is possible to skip some release steps.</p>	

	<p>Final release (last release status): - Select in the drop-down field the last itemized release status and send it to the addressee requested.</p>	<p>„In progress“</p>
	<p>Refuse of release: When you like to refuse the release then the typist has to be opted when selecting the option “release note send to”.</p>	
<p>typist</p>	<p>The typist can stop the release process regardless of whether the document has been finally released or the release has been refused.</p>	<p>„In progress“</p>
	<p>A. Final release After the author has set the last release status and the secretary received a notification about this, she can, for example, print out the dictation and set the dictation as “finished” as usual.</p>	<p>„Finished“</p>
	<p>B. Release refused In the document information accompanying the dictation is a note “release refused”.</p>	<p>Depending on the reason for the refusal, the secretary can set the dictation into the “to be released” list again.</p>