



The Comprehensive IT Solution for Awarding Organisations

The Quartz information system has been developed by Portico Consulting to support the entire lifecycle of learning and qualification development and management.

Quartz supports all aspects of operations for programmes of vocational learning, QCF and other qualifications – including programme and qualification development, learner registration, achievement tracking, internal and external verification, and certification. Business management is supported through integrated CRM and business intelligence tools. Quartz provides substantial efficiency benefits, improvements in customer service, and compliance with regulatory requirements. It is scalable and affordable for large and small organisations.

Fact Sheet - Document Management

Why Use Document Management?

Quartz has document management functionality fully integrated with the rest of the system.

It is frequently used to support:

- Management of enquiries, general correspondence, conferences and other events.
- Developing and managing policies and procedures, new learning programmes, etc.
- Supporting of Data Protection and other regulatory and audit requirements.
- CRM, managing correspondence and other contacts with stakeholders in an integrated way.

Benefits include:

- Savings on administrative time, reducing paper, distribution and copying costs.
- Better service standards by improving staff access to and management of customer/provider documents.
- Improving staff efficiency by making documents easier to find.
- Meeting regulatory requirements.

Quartz's Document Management Functions

Quartz has a range of document management functions integrated seamlessly with the rest of the system. Some key facilities are outlined below.

Documents securely stored, and attached to items

Documents of all kinds – word processed, spreadsheets, presentations, etc – can be held securely in Quartz. Each document can be 'attached' to one or more items in the database: organisations, programmes, qualifications, events, etc. Documents can be retrieved by searching on title, author, and the *full-text* of their contents; and documents can be retrieved from any of the items to which they have been attached.

Attaching/Uploading existing documents

Quartz allows users to upload and attach any type of document (word processed, spreadsheets, etc.) from a local or network drive, 'drag-and-dropped' from an e-mail, or by scanning directly from a paper document. The document is uploaded once, and can be attached to one or more programmes, organisations, qualifications, contacts, events, etc.

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Creating documents using Quartz data

Quartz integrates seamlessly with Word's mail merge to provide document creation facilities which are a major time-saving benefit. Documents can be created from user-defined Word templates, with information from the Quartz database (e.g. contacts, events, organisation details) automatically merged directly into the documents. This allows communications to be quickly and easily produced. Documents are automatically attached to any corresponding items used in their creation (people, organisations, qualifications, etc.), and can be attached later to other items if necessary.

Version control – check-in/check-out

Robust document version control is important where there are multiple people working on or reviewing a document as it is created or updated. Quartz offers a 'check-in/check-out' facility which enables a master copy of the document to be checked in and out when it needs to be worked on. When the document is checked out the master remains available to other users. Each version is kept separately and previous versions are held in case there is a need to go back to an earlier one. Whilst a document is checked out, different colleagues can work on it, add comments, etc. and it can then be uploaded as a new master copy.

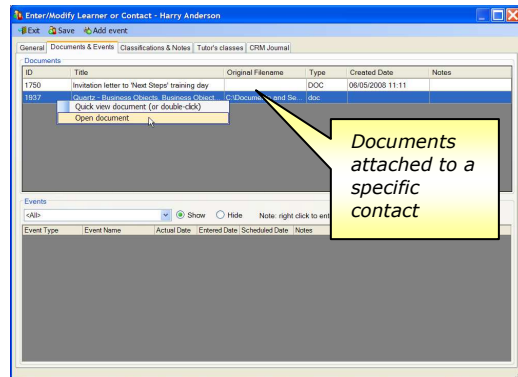
Documents available anywhere, anytime

All documents are accessible through the Quartz Smart-Client wherever the user might be located – providing support for on-the-road, peripatetic, and home access; and access for external stakeholders.

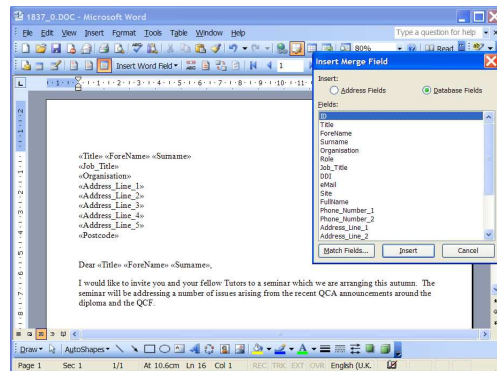
Portico Consulting

Portico Consulting provides a range of management consultancy and technology services in the public, not for profit, and education sectors. We have extensive experience of supporting the operations of awarding bodies and our systems have managed the achievement records and certification of millions of learners.

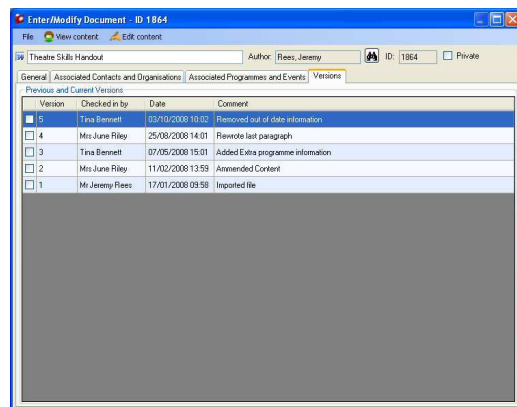
For more information visit www.quartz-system.com, call and ask for Robert Gale or Matthew Robins, or e-mail mail@quartz-system.com



Documents can be uploaded and attached to Quartz items, for example an organisation, a programme or qualification, an event, or to a contact as shown here.



A letter based on a template with Quartz data fields automatically available for inclusion.



The Version tab illustrates this document's 5 versions. Each version is date, time and user stamped so that the provenance of a document is clear, and can be reviewed or compared to other versions.