

Parnassus Document Management – Overview Functionality in Parnassus v5.3

1 Scope

- New menu option – Documents – All documents are displayed here.
- Turned On/Off by a setting.
- Available for AO and Centre Users

2 General

- Searching
- Add/Edit/Delete document

The screenshot shows the 'Documents' section of the Parnassus application. At the top, there is a navigation bar with various menu items. Below the navigation bar, the 'Documents' section is displayed. It includes a search bar, a 'Show 10 entries' dropdown, and a table of documents. The table has columns for Document Name, Type, Category, Created, and Created By. There are also filter boxes for 'Type to filter' and 'Select values'. At the bottom, there is a pagination control showing 'Showing 1 to 10 of 94 entries' and a set of page numbers (1, 2, 3, 4, 5, ..., 10, Next).

| Document Name | Type | Category | Created | Created By |
|--|------|------------|---------------------|-------------|
| General Document - AO only | 📄 | a new test | 17/01/2020 16:06:22 | PR AO Admin |
| 5068-Verification | 📄 | a new test | 17/01/2020 15:41:26 | PR AO Admin |
| Notepad txt file | 📄 | a new test | 17/01/2020 15:40:34 | PR AO Admin |
| 5068-Verification | 📄 | a new test | 17/01/2020 14:57:23 | PR AO Admin |
| Centre Linked doc - no restriction | 📄 | a new test | 17/01/2020 13:56:06 | PR AO Admin |
| Link Qual restrict to DJ centre | 📄 | a new test | 16/01/2020 16:49:48 | PR AO Admin |
| General Document - no links restricted to 1297 | 📄 | a new test | 16/01/2020 16:20:57 | PR AO Admin |
| Linked Learner 134989 - no restricted Centre | 📄 | a new test | 16/01/2020 15:54:45 | PR AO Admin |
| learner | 📄 | a new test | 15/01/2020 16:13:32 | PR AO Admin |
| Notepad txt file | 📄 | a new test | 15/01/2020 15:47:50 | PR AO Admin |

| Attribute | Notes |
|-----------|--|
| Notes | <ul style="list-style-type: none"> • You can add Notes against a document. • Notes can be visible to everyone or be set "AO Only". • All AO users can see "AO Only" notes. • Centres cannot see "AO Only" notes or notes added by other Centre users.. |

Add/Edit Document

Add Document

File
 Remove File

Uploading: **Complete**

Document Name

Category

AO Only
 Centre Read Only

Linked To

Restricted To Centre(s)
 Not restricted by centre. Edit

| Attribute | Notes |
|----------------------|--|
| Document Category | <ul style="list-style-type: none"> A simple list of User configurable Categories |
| AO Only | <ul style="list-style-type: none"> When ticked only AO users can see the Document / Notes |
| Centre Read Only | <ul style="list-style-type: none"> When ticked no changes can be Saved by Centre users. |
| Link To (Entity) | <ul style="list-style-type: none"> You can link a document to a Centre, Qualification or Learner. When you link the document, it is also visible in the Document tab on the appropriate screen; Centre, Qualification, Learner. The default is for a document to be Unlinked – i.e. General. The Documents area shows all documents in one place. Document Management can be turn on/off per Entity |
| Restrict To (Centre) | <ul style="list-style-type: none"> <i>Restrict To</i>, limits the Centres that can see a document. When a Centre User logs in they will see; Documents available to “All” Centres and documents restricted to them. |

Potential Further Features

| Feature | Detail |
|---|--|
| Document Notifications | |
| EV Login | Cater for the fact an EV can work at multiple centres |
| Distribution Lists & Email Functionality | Send emails to distribution list when document added/updated. |
| Reading Lists | When you add a document, set up a reading list, add a way of asking people to read and confirm they have read the document. For example, if you require a group of users to read a policy document. |
| Improved restrictions based on User Roles | Rather than just AO/Centre. |
| Integration with Workflow and Forms | Use workflow to drive features and manage documents. |
| Searching by Documents Text | Currently can only search for document names. |
| Record of Document Downloads | |